



2023 2024

# ANNUAL PERFORMANCE PLAN



the gpaa

Department:  
Government Pensions Administration Agency  
REPUBLIC OF SOUTH AFRICA

| YOUR BENEFITS our responsibility |





“

**YOUR BENEFITS  
OUR RESPONSIBILITY**

**01**



“

02

*Enoch Godongwana  
(MP)*

# FOREWORD

# BY THE EXECUTIVE

# AUTHORITY

*The socioeconomic wellbeing of South Africans is a priority for the government together with the Government Pensions Administration Agency (GPAA). In this regard, the GPAA is continuing with its mandate of administering pension benefits for its 1.9 million members, pensioners, and beneficiaries.*

I quote from the words of the former President of the country, Mr Nelson Mandela when he said: "Democracy will have little content, and indeed, will be short lived if we cannot address our socio-economic problems within an expanding and growing economy". Therefore, the GPAA is fortunate to have a sound legal and policy mandate, backed by our political vision, to transform the way it administers pensions to serve our people and to deliver on the promise of a dignified retirement.

The GPAA's impact statement puts emphasis on dignity, care, empowerment and satisfaction of its members and beneficiaries. For members to have access to services such as health care, and have dignity, empowerment, and the ability to provide for themselves and their beneficiaries, pay-outs must be made on time. This must be gold standard that the GPAA strives for day in, day out.

While we live the world's most youthful continue, the GPAA believes that older persons play a vital role in our society and that they must be protected even as we invest in the future.

The GPAA does not operate in isolation, nonetheless it forms part of a larger South African society. The agency plays critical role in the alleviation of poverty and contributing to a healthier and wealthier nation. As part of the global community, our economy is closely integrated with that of the world. This was painfully evident during the worst periods of the COVID-19 pandemic and more recently, the Russia-Ukraine conflict.

As result, over the past three years our economic as suffered serious some setbacks: economic growth slowed; inflation soared along with interest rates, food prices, fuel, transport, and electricity; and households increasingly turned to debt to pay for their basic needs. The economy has since recovered and inflation is moderating, but the outlook remains uncertain and the near future fraught with risks..

It is in this difficult environment that the GPAA must continue striving for excellence and fairness, and fulfill its mandate of administering pensions without any hindrance.

I offer the GPAA and its executive my full support on this journey by endorsing the Annual Performance Plan for the 2023/2024 financial year.



Enoch Godongwana (MP)



03

*Kedibone Madiehe  
Chief Executive Officer*

# STATEMENT BY THE ACCOUNTING OFFICER

*It is an honour to present the Annual Performance Plan (APP) of the Government Pensions Administration Agency (GPAA) for the 2023/24 financial year.*

The GPAA provides pension administration and client service through various channels in our multi-faceted Client-Centric Service model. Our primary service is to pay benefits to our members, pensioners and beneficiaries. We continue to make strides to improve our processes to ensure that benefits are paid on time and that clients have a positive experience across the designated service platforms.

The GPAA remains committed to implementing the 2020-2025 Strategic Plan targets and has adopted new ways of service delivery improvements. These include the decentralisation of services wherein the processing of benefits is not confined to Head Office but also performed at Regional Offices.

The organisation will continue its journey to use automated interfaces with the South African Revenue Services, the Department of Home Affairs and the National Treasury (NT) Safety Web to reduce the risk of fraudulent claims and to ensure that benefits are paid to the correct beneficiaries. The

main advantage of the interfaces is that they allow for the efficient verification of member information as well as timely processing of the tax directives required to process benefits before payments are affected.

The GPAA has enhanced the Self-Service Mobile APP and the latest updates are available on Google Play Store and Harmony OS to cater for the latest Android and Huawei devices. The Mobile APP has been fully rolled out to pensioners and beneficiaries in about 177 countries, an achievement worth noting as we aim to fully automate our services.

We continue to strengthen our efforts to reduce the Unclaimed Benefits list. An intervention strategy as well as a communication strategy have been concluded to guide our interventions. We expect to experience a significant reduction of the list in the short-term period.

The challenges of poverty, inequality and unemployment continue to plague our society. The GPAA strives to be an impactful and inclusive institution and will continue to provide opportunities to our diverse sections of society so that we strongly contribute to the national goal of reducing poverty, addressing inequality and unemployment.

This will include the deliberate strategies to empower enterprises owned and managed by women, youth and persons with disabilities. All of these will be implemented in line with the provisions of relevant government policies.

As we respond to the needs of our customers and clients, management continues to realign its budgets to ensure value for money through business case evaluation and structured supply chain principles, processes and adjudication.

To deliver on the seven outcomes by 2025, the GPAA remains focused on the key areas by inculcating the high-performance culture

throughout the organisation. The GPAA's values of Transparency, Respect, Integrity, Courtesy, Service Excellence and Passion remain embedded in its service offerings, with

a renewed dedication to the Modernisation Programme. I look forward to a mutually beneficial relationships with all the GPAA stakeholders in the implementation of this programme.

We will continue to work hard to achieve our targets and meet the expectations of the Ministry as our Executive Authority as well as our customers, namely the GEPF and the National Treasury.

To my colleagues at the GPAA, I am confident that as a collective, we have the wherewithal to serve our clients better and take our agency to greater heights!



Kedibone Madiehe

Chief Executive Officer



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## PART A STRATEGIC OVERVIEW

# 04

# STRATEGIC FRAMEWORK



## OUR VISION

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



## OUR MISSION

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



## 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.

## 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 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.



# STRATEGIC ORIENTED OUTCOMES

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

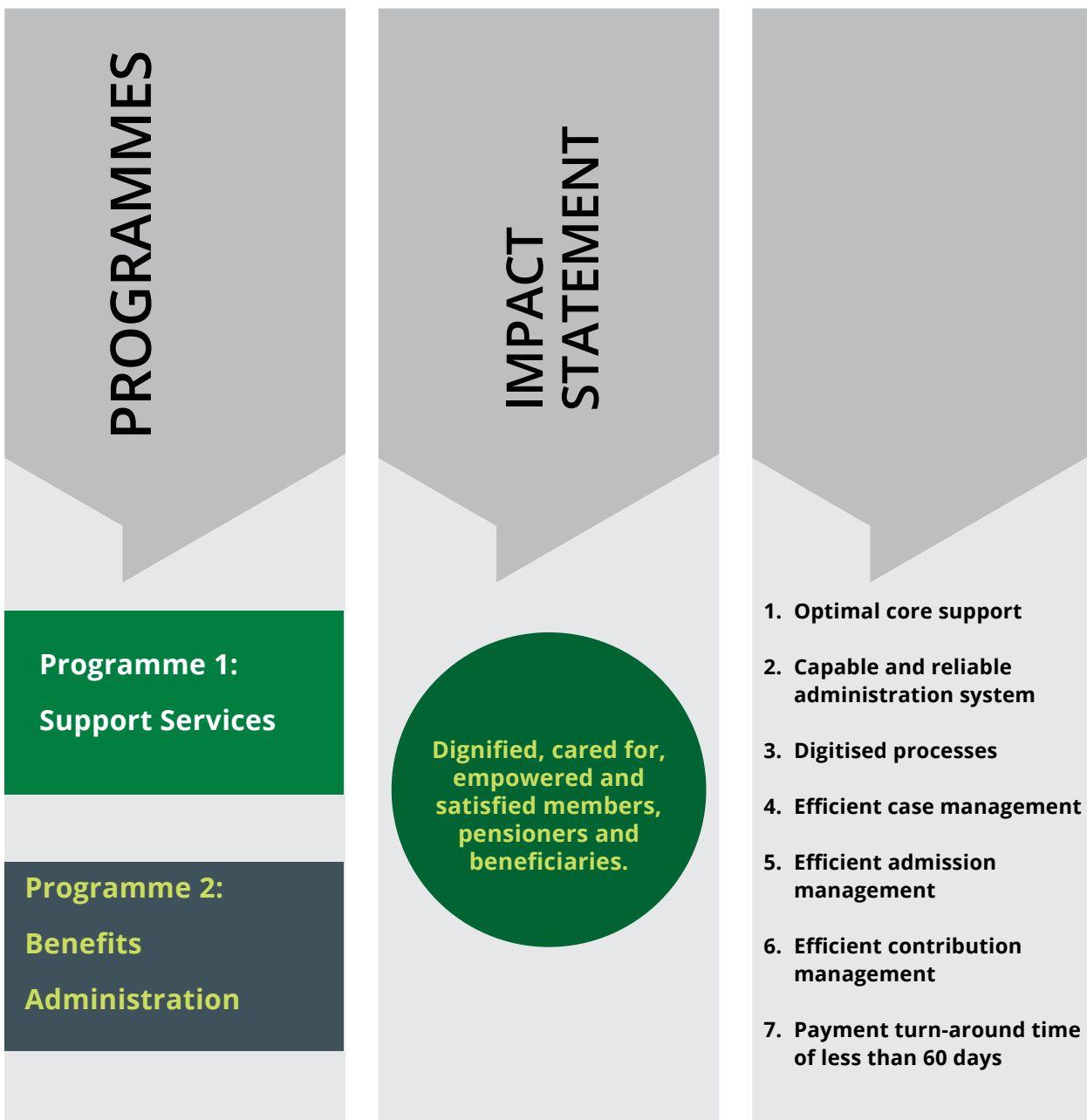


Figure 1 - Impact Statement and Strategic Outcomes





*Towards Impact*

## 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)  
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



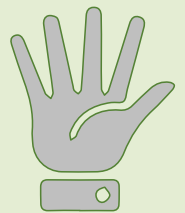
2022/2023

- 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

# Strategic Thrusts

The GPAA has identified the following nine 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.

The Strategic Roadmap deliverables for 2023/24 to deliver on the strategic thrusts are:

1. Reduced internal turnaround to under 15 days;
2. Reduced employer average turnaround time to under 75 days;
3. Managed data;
4. 65% clients reached through digital communication;
5. Business workflow implemented;
6. Streamlined processes;
7. Re-aligned organisation;
8. Paper usage reduced by 60%;
9. Right people at the right positions; and
10. Offering financial services

# 2 UPDATED SITUATIONAL ANALYSIS

**The situational analysis has been duly updated as follows.**

## 2.1 Introduction

South Africa is an upper-middle income country, ranking as the 68th richest per capita out of 133 countries studied. Its 59,3 million inhabitants had a GDP per capita of \$5,655 as of 2020 (1). The GDP per capita growth has averaged -2,0% over the past five years, which is below the regional averages. South Africa ranks as the 70th most complex country in the Economic Complexity Index (ECI) ranking.

Although South Africa is contending with various social ills, it is expected that moving forward it will be positioned to take advantage of many opportunities to diversify its production using its existing methods. Harvard's Growth Lab (1) foresees a growth of 2,23% annually in South Africa over the coming decade.

The enactment of various pension fund legislations since 1911 has played a significant role in the development of pension systems in South Africa. In recent years, South Africa's pension assets have shown considerable growth in the economy. Scholars have established that economies with higher savings are able to boost domestic investment, finance current account deficits, and stimulate economic stability, with lower reliance

on foreign capital which then translate to economic growth. (2) South Africa's savings are an important contributor to an overall national growth, and the low level of savings perpetuate a low growth trap.

Globally, South Africa is a signatory to the United Nations Sustainable Development Goals (SDGs) 2030. The SDGs were adopted by all the United Nations (UN) member states in 2015, providing a map and a blueprint for peace and prosperity for people and the planet, for now and in the future. In the 17 SDG's ending poverty and other deprivations must be in alignment with the strategies that will improve health, education, reduce inequality and economic growth.

On the continent, the African Union Agenda 2063 is a developmental and transformation agenda for African countries. One of the aspirations of the Agenda 2063 is that "African countries will be amongst the best performers in global quality of life measures". The strategies to achieve this aspiration include "inclusive growth, job creation, increasing agricultural production, investments in science, technology, research and innovation, gender equality, youth empowerment and the provision of basic services including health, educations, nutrition, shelter" (3).

Locally, in May 2010, the fourth Administration established the first National Planning Commission (NPC) with the mandate to chart a developmental agenda and trajectory for the country. The work of the NPC gave birth to the National Development Plan (NDP) Vision 2030 as the inspiration for achieving the socio-economic developmental needs of the country. Its aims are to reduce poverty, create jobs and reduce inequality by 2030. It predates the adoption of the SDGs 2030 as adopted in 2015 and Agenda 2063 as adopted in May 2013. The NDP posits that the country can only realise these goals by harnessing the energies of all its people in all sectors of society. It is therefore critical that government capabilities are enhanced to create an enabling environment for growing an inclusive economy (4)

## Unemployment

The young people in South Africa continue to be disadvantaged in the labour market with an unemployment rate higher than the national average. According to the Quarterly Labour Force Survey (QLFS) for the first quarter of 2022, the unemployment rate was 63,9% for those aged 15 - 24 and 42,1% for those aged 25 - 34 years, while the current official national rate stands at 34,5% (5).

## Dependency on SASSA grants

In his Medium-Term Budget Policy Statement (MTBPS), the Minister of Finance, revealed that almost half of South Africans are dependent on South Africa Social Security Agency (SASSA) grants (7) with 28 million (46% of the country's population) as grant beneficiaries.

## Life Expectancy

According to the Statistics South Africa Life Expectancy Report (2022), the life expectancy at birth has improved from 61,7 years in 2021 to 62,8 years in 2022, while the World Bank Data indicates an average low-income life expectancy of 64 years. South Africa as a developing nation is well aligned to that of countries with similar incomes.

The increase in life expectancy brought about the importance of health care and other social services required by people, taking into account the age profile of the population and the vulnerability of key populations in the country with the elderly being the most vulnerable.

## Savings

According to the Sanlam Benchmark Survey 2021 Report, South African households do not save sufficiently for retirement nor for their short-to-medium-term needs. Household savings average just above two percent of GDP per annum, most of which is contractual savings for retirement funds (8). Members generally do not preserve their savings, and commonly access them when leaving their jobs.

According to the Sanlam Benchmark Survey Report (2021), in South Africa the average replacement ratio between last salary and pension is around 25 to 30 percent, resulting in retirees, simply concluding that pensioners cannot survive on the starting pension offered by a guaranteed annuity. Furthermore, discretionary savings are rather low, approximately 34 percent of the population do not have enough savings to last more than a month should they lose their income/jobs (9). With that, financial education is key to enabling South Africans to reduce their financial stress and increase their income at retirement.

Thus, by implication, more working South African individuals have to look after their elderly because the retired individuals do not have enough to sustain their lifestyles prior to their retirement, which adds further strain to the disposable incomes of South Africans (10).

Pensions therefore play a critical role in old age support systems. The GPAA is thus one of the most important institutions in South Africa because it determines the living standards of millions of citizens of South Africa and plays a decisive role in the South African economy.

## 2.2 External Environmental Analysis

### 2.2.1 Political Consideration

The GPAA reports to the Minister of Finance and is mandated to administer funds and schemes on behalf of the Government Employees Pension Fund (GEPF) and National Treasury's Programme 7. The organisation has more than 1.265 million active members from more than 325 government departments and about 473 312 pensioners and other beneficiaries. In terms of its geographical footprint, the GPAA has client walk-in centres in all nine provinces of South Africa.

As a government component, the GPAA is affected by legislative reforms. One such legislative reform is the Two-pot retirement system. National Treasury published a proposal for a Two-pot retirement system which will allow for pre-retirement withdrawals whilst simultaneously contributing to the preservation of savings.

The system is conceptualised in such a way that one-third of a member's contributions would be allocated to (Pot One/Access pot) where a member can access it at any time before retirement while two-thirds will be allocated to (Pot Two/ Retirement pot) which will not be accessible before retirement and must therefore be preserved until retirement. The member will be allowed to access (Pot One) at any time but can only be withdrawn once a year depending on the funds ability to effect withdrawals and subject to minimal value. In instances where the member makes a partial withdrawal, a second withdrawal will be allowed within the year for any amount remaining in the access pot (11).

The former Minister of Finance, noted in the 2020 Medium Term Budget Policy Statement (MTBPS) (12) that consideration is being given to allow limited pre-retirement withdrawals from retirement

funds under certain conditions, provided this is accompanied by a mandatory preservation upon resignation from a job. Retirement members who will be eligible to benefit from this are the ones whose funds and schemes are regulated by the Pension Funds Act of 1956. This, however, does not make provision for GEPF employees as the fund is regulated by the Government Employees Pensions Law (GEP Law).

The GPAA is categorized as a financial institution and an essential institution by virtue of the aforementioned mandate it has to administer pension payments and other benefits to GEPF and NT fund members. Nonetheless, the Financial Sector Conduct Authority (FSCA), has legislation that regulates financial institutions in the Republic of South Africa. By implication, the GPAA may be bound to the said legislation.

The COFI Bill was published for public comments early in 2019 and thereafter revised based on public engagement for tabling in Parliament later in the same year. This Bill intends to address regulatory arbitrage and ensure fair customer treatment by all providers of financial instruments, services, and products.

Section 4A (2) refers: A public sector pension fund which at the date of commencement of this section is not registered in terms of this Act, must apply for registration in terms of section 4 of this Act, within a period of 12 months after the date of commencement of this section, subject to any exemptions granted and conditions imposed by the Authority in terms of this Act.

By implication, the GPAA as the administrator of Government Employees Pension Fund may be required to register for licensing or operate under the license of the GEPF as the pension fund. A further implication is that the GPAA might need to align its strategy forthwith. A reviewed strategy should incorporate plans to prepare resources (both Human and Financial) for increased capability.

## 2.2.2 Socio-Economic Perspective

South Africa remains one of the largest and most industrialised economies on the continent, however, the increasing implementation of loadshedding; the KwaZulu-Natal province floods; unrest and looting; the impact that the COVID-19 pandemic had on global production and shipping; the increasing fuel and food prices spurred by the Russian / Ukraine conflict; intermittent blockades of key domestic road transport routes by truck drivers; and supply-chain disruptions stemming from China's COVID-19 zero measures all pose a threat to South Africa's GDP growth outlook. These factors have had a negative impact on South Africa's exchange rate, stock market indices and bond valuations, further resulting in a poor economic outlook for the local economy and ultimately affecting local citizens' spending and saving habits.

The South African government has rolled-out an Economic Reconstruction and Recovery Plan to minimise the impacts of COVID-19, where job creation remains at its centre. The plan aims to respond to the immediate economic impact of COVID-19, by focusing on job creation and expanding support for vulnerable households (10).

South Africa has renewed and refocused efforts to ensure that our financial sector provides consumers and businesses with good-value products to receive and make payments, save, borrow, and insure against daily risks.

South Africans are spending approximately three-quarters of their take-home income to cover debt. The most recent local Fiscal policy, released by the National Treasury in 2022, is focused on reducing the budget deficit and stabilising the Debt-to-GDP ratio.

To address income poverty among the elderly, the government has proposed a social security and retirement reform. This is based on reports from various commissions that reviewed the status and the need for the reformation of the South African pension system.

The key objective is to set up an appropriate social security concept that prioritises the needs of people without any incomes, with insufficient incomes and/or who are engaged in informal activities, leading towards the creation of a comprehensive social security system.

To cushion the effects of poverty, the country has implemented a Temporal Social Relief of Distress (SRD) Grant for unemployed youth (13). This grant is administered by SASSA on a digital platform. Such digital platforms allow for efficient social services and seem to be the future of how the State wishes to interact with its citizens.

In line with international practice, the government is considering the introduction of a mandatory earnings-related contributory system administered on a payroll-tax basis. In the context of a comprehensive social security framework, a basic social security arrangement is proposed to complement the redistributive social assistance.

In light of the tough macro environment that South Africa currently faces, it is now, more than ever critical for an organisation like the GPAA to deliver on its mandate of effective pension administration. The GPAA is an important role player in poverty alleviation with its commitment to reducing turnaround time (internally and externally) to ensure that it pays benefit claims within the timeframe stipulated by the law. This will in turn help alleviate the financial pressures faced by many households. In light of the GPAA's contribution to the economy via its administration of about 1.9 million benefits with a household ratio of at least 1:4, as an administrator the GPAA contributes to the livelihood of about 7.2 million South Africans, which is approximately 13% of the population.

The GPAA implemented the Internship Programmes to help reduce the youth unemployment rate. The Programme is aimed at affording graduates an opportunity to be exposed to the work environment in the areas of their acquired qualifications. The intention is to give them exposure that will equip them to increase their chances of employability



while reducing the unemployment rate of youth graduates (14).

### 2.2.3 Technological Perspective

The pervasiveness of technology in the digital economy has resulted in increasing demand for professionals with a unique blend of analytical, technical, business and communication skills. Technology is transforming many lives, and the pension industry is no exception.

Pensions worldwide have difficulty dealing with the complexity, volume and urgency of changes and updates to investment data. More than 70% of pension funds cite challenges such as updated data, adding new data types and sources as among the most formidable challenges.

Through technology, members as well as the pensioners can easily have access to their financial information and update their personal information. This can finally dispel the popular belief that pensions are too complex to engage with or are only relevant at a certain age. Albeit, technology can assist in combating pension fraud, with measures from secure identity checks to encryption. It is well known that traditional knowledge-based authentication is being phased out by many companies around the world, since fraudsters are becoming even more sophisticated. Biometric technology is proving to be a particularly essential tool in the fight against fraud. New analytical techniques and big data could lead to the creation of more efficient and more personalised retirement solutions, in particular for the pay-out phase at the GPAA. Financial data and analytics improve understanding of consumers and their savings and spending habits, therefore solutions for financing retirement could be better tailored to individuals' specific circumstances.

The GPAA, in rolling out its Self-Service Application is also faced with this challenge, especially in rural communities, where its members and pensioners reside. With a growing need for immediate

information by about 1.9 million GEPF and National Treasury clients, the GPAA is advocating for the availability of information through Self-Service and other digital communication channels.

The GEPF, through the GPAA, has invested in several technologies such as the Pension Case Management (PCM) system, Self-Service Application, Benefit Payment Automation, Digital Signatures, Queue Management System, Enterprise Data Management System and finally, the Integrated Document Management System. Whilst the technology is in place and the administration processes are working, in 2023/2024 a reviewed Modernisation Programme will work on improving the existing systems and service efficiency.

### Self-Service

The Client Relationship Management (CRM) unit has done an analysis of the top five enquiries members make and they are, i. Proof of income, ii. Benefit statement, iii. Exit Case inquiry, iv. Funeral Benefit, and iv. Nomination of Beneficiaries.

A concern is noted that members still prefer to contact the Call Centre to request printed benefit statements despite that members can download it on the Self-Service app/platform. CRM consistently educates members to utilise the Self-Service platforms.

Another concern noted is that members prefer to contact the Call Centre to enquire about the progress on exit cases while this can also be viewed on the platform. The concern signifies that members do not utilise the Self-Service options optimally.

With regard to the Self-Service, there are approximately 613 055 active members registered. On average, about 5 800 members register on Self-Service monthly. This is a positive step towards ensuring full on migration to Self-Service app. Figure 2 - Closing Balance on Service Enrolment depicts the six-month period ending in September 2022 statistics of new registrations.

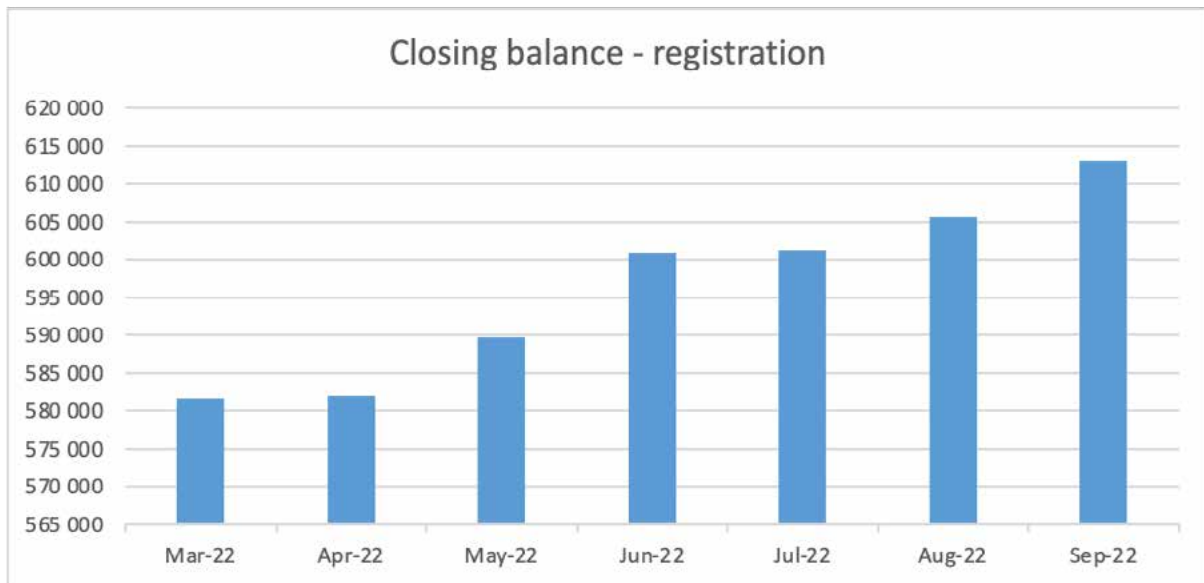


Figure 2 - Closing Balance on Service Enrolment

The GPAA needs to constantly keep itself in check with the latest trends in technology, locally and abroad for it to be on the same level of technological advancement as its counterparts.

### Pension Case Management (PCM)

The PCM system is used by GPAA employers to submit all exit documentation digitally for processing. This works like the SARS e-filing system where no hard copy documents are submitted.

The adoption rate of the application is currently at 98%, thus 98% of exit claims are submitted electronically by the employers.

The value add is the reduced time and effort required to submit the exit documents to the GPAA, the movement of the hard copy submissions and the instant submission of the claim.

The automated workflow capability also allows for automated business intelligence and reporting to monitor and manage the exit submissions, rejections, claim tracking and turnaround times for Service Level Agreement (SLA) reporting.

### Benefit Payment Automation (BPA)

BPA allows the GPAA to process employer submitted claims digitally. Except for Death claims, all claims are processed digitally. There are other process exceptions that require manual processing of claims within the value chain of the GPAA. The same value add was derived from the automated workflow as indicated for PCM in respect of claim management, reporting, claim tracking and the measurement of turnaround times.

## Digital Signatures

Digital Signatures allowed for processing and approval of documents during lock down. The GPAA continues to utilise digital signatures as this allows for a time stamp on the approval of documents, as well as some level of security on digitally signed documents. The document cannot be changed after the digital signature is added.

## Queue Management System (QMS)

The QMS solution facilitates queue management at the Walk-in-Centres, which helps speed up servicing of GPAA customers and reduces the waiting time. The value add is in the improvement of customer service proficiency and channelling of staff to attend to client specific requests. The GPAA is required to report on client satisfaction as part of its Service Level Agreement (SLA) with GEPP and NT and the solution allows for the management of information and the reporting required on the SLAs.

## Enterprise Data Management System (EDMS)

The GPAA identified Enterprise Data Management as a key business capability to manage administration data and data quality. The EDMS solution allows for reporting on data discrepancies which allows data governance structures to manage, prioritise and allocate data cleansing and management activities. The GPAA is also required to report on data cleansing for both the GEPP and NT SLAs and therefore EDMS provides the information needed to report on the progress and data quality levels.

## Integrated Document Management System (IDMS)

IDMS enables the GPAA to convert hard copies of administrative documents to digital images that are linked to client records and electronically grouped to client profiles. The solution simplifies retrieval and access to the electronic images for processing and for enquiry purposes. The images also allow for an audit trail on client records and the administration actions to process the submitted information. The GPAA is not only in the process of converting hard copies to digital images, but will also deploy channels for the electronic submission

of documents that will be stored on the same solution for tracking, archiving and audit purposes.

## 2.2.4 Environmental Consideration

The Green Stimulus Recovery Programme, which forms part of the post Coronavirus Disease (COVID-19) recovery programme, aims to protect natural resources while contributing to equitable economic growth, providing employment to marginalised communities and growing economic sectors reliant on the environment without destroying it.

The National Climate Change Adaptation Strategy and National Climate Change Bill aim to serve as an overarching legislative framework for adapting to and mitigating the effects of climate change as supported by the implementation of the low-carbon emissions development and growth strategy for South Africa. The National Climate Change Bill provides the Constitutional right to an environment that is not harmful to the health and well-being of its inhabitants, and to have the environment protected for the benefit of present and future generations through reasonable legislative and other measures that secure ecologically sustainable development and the use of natural resources while promoting justifiable economic and social development (15).

South Africa's National Climate Change Adaptation Strategy (NCCAS) supports the country's ability to meet its obligations in terms of the Paris Agreement on Climate Change. The NCCAS outlines a set of objectives, interventions and outcomes to enable the country to give expression to its commitment to the Paris Agreement (16) for Climate Change. Developed in consultation with all relevant stakeholders and approved by Cabinet, it aims to reduce the vulnerability of society, the economy and the environment to the effects of climate change.

It gives effect to the National Development Plan's vision of creating a low-carbon, climate resilient economy and a just society. The GPAA initiated the idea of being a paperless environment, as that will reduce paper consumption. This initiative is driven by process changes to include and ensure the usage of digitised documentation and business. The latest Modernisation Programme was the introduction of the Self-Service Application. Although this is still at the infant stages, it is a step towards a paperless approach (17). Moreover, the GPAA has in all its facilities started the movement towards using non-carbon energy supply and as its first, the building in Mbombela is in line to be equipped with such.

### 2.2.5 Legislative Perspective

The GPAA's legislative mandate emanates from Proclamation No. 10 of 26 March 2010, wherein the GPAA was established as a government component. Other legislative frameworks that govern the GPAA are the Pension Funds Act (PFA) 24 of 1956 and the Protection of Personal Information Act POPIA (2013).

The Financial Sector Conduct Authority includes legislation that covers the regulation of finances in the country, which in turn impact the GPAA as a financial institution that administers the payment of pensions and other benefits to its members and beneficiaries. In its endeavor to assist the GEPP to comply with the COFI Bill, the GPAA has placed financial services on its strategic radar.

### Broad-based Black Economic Empowerment (B-BBEE) Act 53 of 2003

The GPAA and its supply chain framework, policy and standards ensure the implementation of the Act. The specific measures for Black Empowerment have been realised throughout the supply value chain of the GPAA. .

## 2.3 Internal Environmental Analysis

This section presents the organisational structure and provides details on the Programme and Sub-programmes of the organisation, the performance information which also identifies the organisation's SWOT (Strength, Weaknesses, Opportunities and Threats), as well as the APA (Achieve, Preserve and Avoid).

### 2.3.1 Organisational Overview

The structure of the GPAA's Strategic Plan is directed by the CEO and consists of two Programmes, namely: 1) Support Services and 2) Benefits Administration, which are supported by eight sub-programmes as depicted in Figure 3 - GPAA's Organisational Structure..



Figure 3 - GPAA's Organisational Structure

The GPAA has approved a structure with 1024 permanent positions as depicted in Table 1 - The GPAA's Positions. In addition, there are 169 contract positions and 12 temporary positions, resulting in a staff compliment of 1205 positions.

Units	Business Units	No. of Posts (As-is)	Contract Positions	Temporary Position	Total	
Operations	P2.1 National Treasury	106	13	0	119	
	P2.2 Employee Benefits	175	27	0	202	
	P2.3 Client Relationship Management	368	89	0	457	
Support	CEO	3	0	0	3	
	Internal Audit	16	0	0	16	
	Fraud and Risk	19	6	0	25	
	Legal	18	1	2	21	
	Corporate Services	169	9	2	180	
	ICT	52	7	0	59	
	Finance	98	17	8	115	
	<b>Grand Total</b>		<b>1024</b>	<b>169</b>	<b>12</b>	<b>1205</b>

Table 1 - The GPAA's Positions

The following section provides an overview of Programme 1 (Support Services) and Programme 2 (Benefits Administration), as well as the eight sub-programmes.

## Programme 1 - Support Services

Programme 1 administers the business and governance affairs of the GPAA and gives rise to the strategic outcomes in support of the core business of Programme 2.

### 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.

### 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 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.

### 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 agency 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. As part of its current initiatives, through the Modernisation Programme, the GPAA is in the process of automating its core business processes and expanding its electronic outreach with the aim to provide its clients and customers with secure access to its services.

### 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 are 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.

### 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 GPAA has the capability of withstanding threats that could bring the GPAA or its stakeholders into disrepute.

## Programme 2: Benefits Administration

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 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 Associated Institutions Pension Fund (AIPF) and Temporary Employees Pension Fund (TEPF) administered by 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. 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.

### 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. The service channel operations, namely: Call Centre, 11 Mobile Offices, three (3) co-locations and 16 Walk-in 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 also provides employer education and training through its regional and employer liaison units and through Outreach programmes such as Roadshows, National Departments Roadshows, Retiring Member Campaigns and Human Resources 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.

## 2.4 MODERNISATION PROGRAMME

The in-flight projects that are underway to improve the current business operations are: Identity Access Management (IAM), Enterprise Content Management (ECM), Digital Communication, and Pension Case Management (PCM) / Benefits Payment Administration (BPA).

In 2022/23 the Request for Information (RFI) process had been concluded successfully allowing the GPAA and the GEPF to test the market for latest best practices in Pensions Administration. This exploratory exercise was detailed enough to provide relevant insight into leading and bleeding edge technologies and working principles. Albeit,



as outlined in the 2022/23 APP the Programme Manager for Modernisation was appointed in July 2022 to conceptualise and design the programme plan for implementation of the solutions that will replace CIVPEN, the legacy pensions administration system. The planning incorporates the lessons learnt from the previous modernisation initiatives.

Nonetheless in the 2023/24 the Modernisation programme will follow an Agile approach to fastrack the deliverables and outcomes. Work on the Request for Proposal (RFP) has commenced with the engagement of Business Analysts to draft business cases for the Pension Administration Solution (PAS), Customer Relationship Management (CRM) and for the Financial Management Solution (FMS) and to do Cost Benefit Analysis of the aforementioned.

These are the core modules required in the new solution to replace CIVPEN, and to 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 GPAA's mandate. Leveraging off the AS-IS Enterprise Architecture and the recommended TO-BE Enterprise Architecture based on previously conducted assessments, will pave the way forward to a less expensive and more efficient roll-out of the identified gaps.

It remains essential to capacitate and resource the Modernisation Programme to ensure successful implementation. To this end an MTEF budget of R125.7 million has been allocated and approved by the GEPP. The capacitation will include critical skills in organisational change management including but not limited to: business, technical, organisational readiness and behavioural transformation.

The GPAA and GEPP Management have identified, assessed, and evaluated the Modernisation risks. Various risk responses and control activities were defined and are being implemented to mitigate risk exposure.

## 2.5 GPAA CORE BUSINESS

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

FUNDS AND SCHEMES:	APPLICABLE LEGISLATION:	ADMINISTERED ON BEHALF OF:
Government Employees Pension Fund (GEPP)	Government Employees Pension Law of 1996	GEPP's Board of Trustees
Temporary Employees Pension Fund (TEPP)	Temporary Employees Pension Fund Act 75 of 1979	National Treasury's Programme 7
Associated Institutions Pension Fund (AIPP)	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 2 - Legislations that govern Schemes and Funds Administered by the GPAA

## 2.6 STAKEHOLDER ANALYSIS

The GPAA is committed to building and strengthening relationships with all of its stakeholders. The organisation's stakeholders, its core services and the interactions associated with each person or group are as indicated in Table 3 - GPAA Stakeholders:

STAKEHOLDER	CORE SERVICES PROVIDED / INTERACTION POINTS
<b>External Stakeholders</b>	
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 (GEPP)	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 GEPP as a non-statutory ombud in order to provide for a voluntary complaint handling mechanism
<b>Internal Stakeholders</b>	
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 3- GPAA Stakeholders

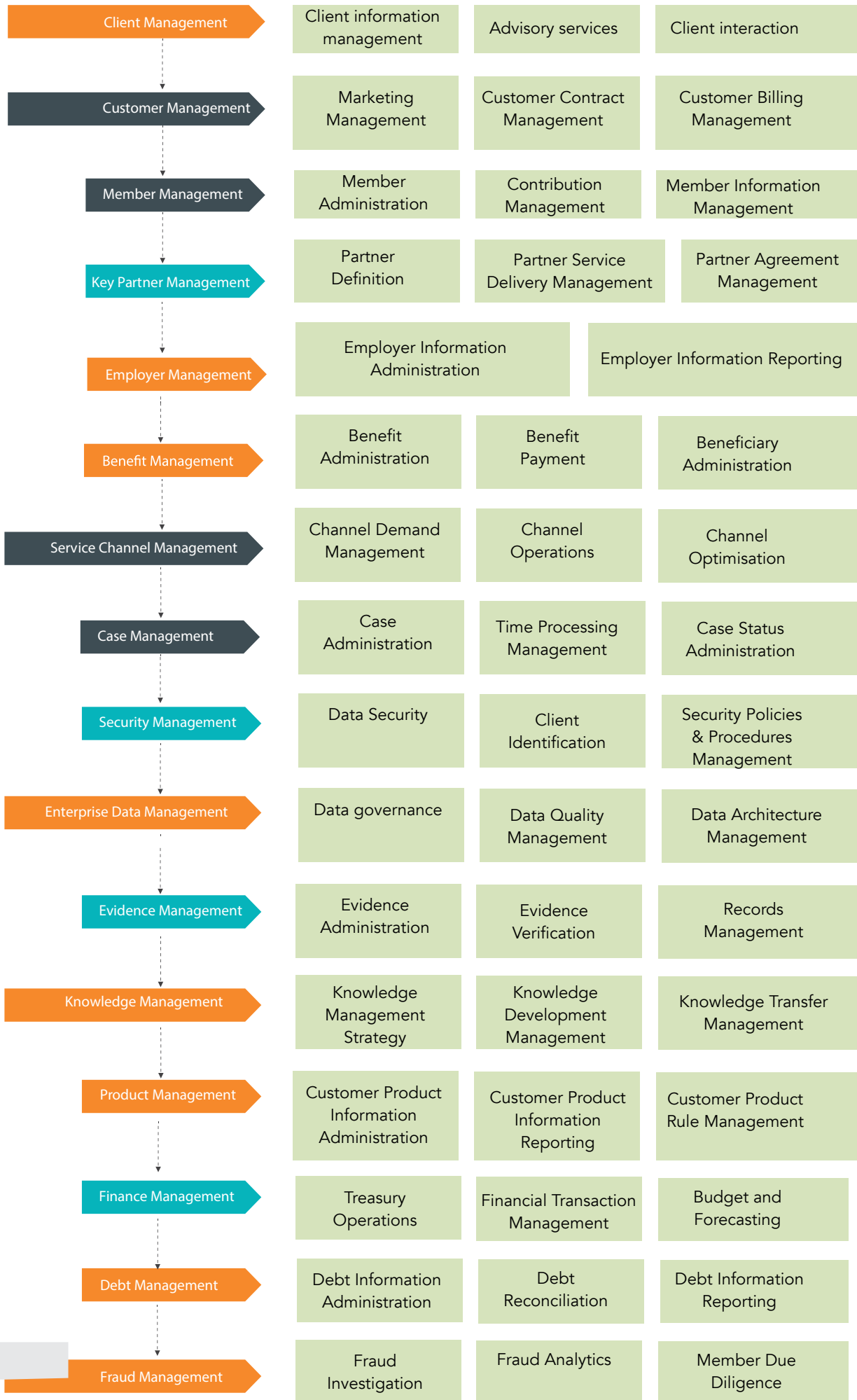
## 2.7 THE GPAA's CAPABILITY MODEL

The capability model was first published at 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 to the capabilities required to deliver the services 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 have been 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 in Figure 4 - The GPAA Capability Model.

THE GPAA'S CAPABILITY MODEL



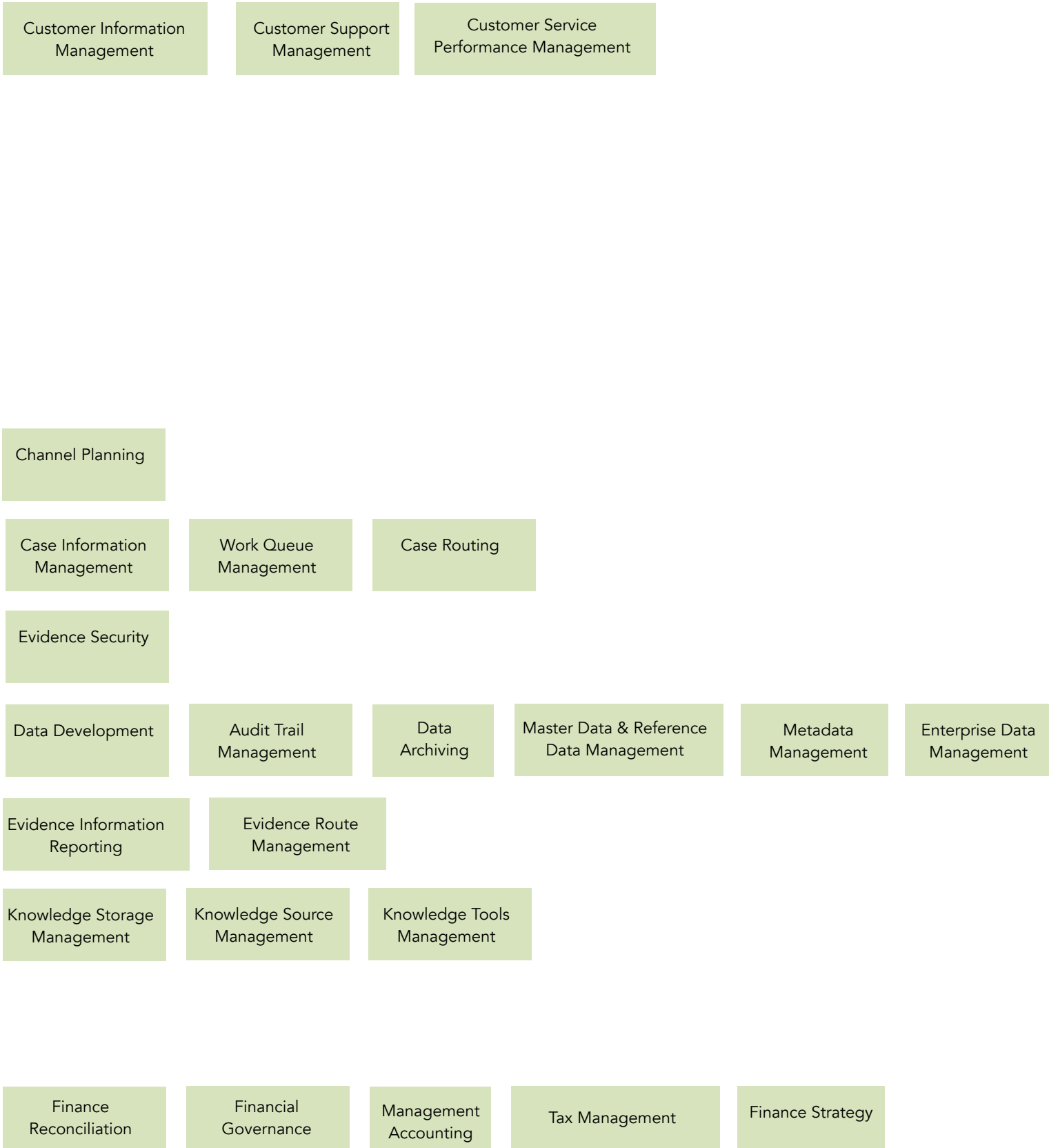


Figure 4 - The GPAA Capability Model

## 2.8 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 Corporate Services, Financial Services, Business Enablement (ICT), Strategic Support and Governance. Currently, 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 in Figure 5 - GPAA Value Chain:



Figure 5 - GPAA Value Chain

## 2.9 DEMOGRAPHICS OF THE GPAA'S CLIENT BASE

The GPAA has a client base of approximately 1.930 million people, of which the largest populace is in the GEPF, amounting to 91% of the GPAA's administration payload. National Treasury funds have approximately 162 960 (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 tabled in Table 3 - Member count as at 31 March 2022.

FUNDS	MEMBER TYPE	MEMBER COUNT	TOTAL MAR 2022
GEPF	GEPF members	1 261 363	1 761 089
	GEPF pensioners	322 223	
	GEPF spouses	167 679	
	GEPF children	9 824	
National Treasury's Programme 7	Post-Retirement Medical Subsidies	142 123	162 960
	Military Pensions	4 606	
	IOD	9 744	
	Other	774	
	Special Pensions	5 713	
AIPF	AIPF Members	2 366	8 797
	AIPF Pensioners	3 774	
	AIPF Spouses	2 567	
TEPF	TEPF Members	8	292
	TEPF Pensioners	163	
	TEPF Spouses	111	
GPAA total members administered			1 933 038

Table 4 - Member count as at 31 March 2022



## GEPF

The GEPF has, in the past ten years, been maintaining its membership. However, since the peak experienced in 2013/2014 its membership now stands at the lowest it has been in a decade, with an average of 1.27million active members in the last decade. As of 31 March 2022, the GEPF had 1.261 active members. Figure 6 - GPEF Active Members, depicts membership movement.



Figure 6 - GPEF Active Members

The decline in membership since 2019/20 financial year could be attributed to government initiatives namely: i. early retirement without penalties and/or, ii. moratoria on positions which resulted in curbing of the wage bill.

## Race demographics

The GEPF had a total of 1 761 089 clients as at March 2022, 59.86% of which were female and 40.14% were male. The figures below depict the demographics of GEPF clients according to race.

### Contributing Members

RACE	Female %	Male %
African	60,24%	39,76%
White	63,78%	36,22%
Coloured	56,63%	43,37%
Asian	60,81%	39,19%
Unidentified	71,98%	28,02%
<b>Total</b>	<b>60,30%</b>	<b>39,70%</b>

Table 5 - Contributing Members per Race

It is noted that 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 2022.

## Pensioners and Beneficiaries (including Spouse and Child Pensioners)

RACE	Female	Male
African	65,74%	34,26%
White	70,50%	29,50%
Coloured	63,79%	36,21%
Asian	54,63%	45,37%
Unidentified	83,10%	16,89%
Total	69,01%	30,99%

Table 6 - Pensioners and Beneficiaries (Include Spouse and Child Pensioners)

It is noted that Africans are 43.80% of the total GEPF beneficiary base, Whites are 39.05%, Coloureds are 5.63%, Asians are 1.70%, and there is an unidentified 9.83%.

## 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 2021/2022 period. This is tabulated in Table 7 - Cases Administered and paid.

CASES ADMINISTERED AND FINALISED AT THE GPAA	CASES PAID 2019 / 2020	CASES PAID 2020/2021	CASES PAID 2021/22
Resignation from GEPF	22 678	16 055	20 659
Retirement from GEPF	34 134	27 960	33 627
Transfer from GEPF	3 150	2 513	11 776
Beneficiaries paid due to death of members	6 683	5 888	11 776
Total	66 645	52 416	69 126

Table 7 - Cases Administered and paid

Table 8 - Recipients of Monthly Payments from the Fund depicts the monthly payments to the members of the various Funds.

RECIPIENTS OF MONTHLY PAYMENTS FROM THE FUND	MONTHLY PAYMENTS	MONTHLY PAYMENTS	MONTHLY PAYMENTS
	2019 / 2020	2020 / 2021	2021 / 22
Injury on Duty (IOD) payments	9 720	10 006	9 744
Post-retirement Medical Benefits	125 464	133 649	142 123
Military Pensions	4 822	4 614	4 606
Special Pensions	6 439	6 043	6 043
Other benefits	887	884	774
Pension benefits (GEPF)	313 173	312 647	322 223
Spouses benefits (GEPF)	163 603	160 667	167 679
Orphans benefits (GEPF)	3 839	6 171	9 824
Pension benefits (AIPF)	4 435	4 083	3 774
Spouses benefits (AIPF)	2 753	2 607	2 567
Pension benefits (TEPF)	185	171	163
Spouses benefits (TEPF)	122	115	111
Total benefits paid per month (averaged)	635 442	641 617	669 446

Table 8 - Recipients of Monthly Payments from the Fund

## National Treasury

Programme 7 administers non-contributory funds on behalf of the National Treasury through a Service Level Agreement with GPAA. The 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;
- Special Pensions;
- VIP Benefits; and,
- Military Medical Accounts.

There was an increase in membership for both Post-Retirement Medical Benefits, Military Pensions from end of 2022/21 to 2021/22 while there was however slight decrease in IOD and special pensions cases administered in 2021/22.

## 2.10 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.

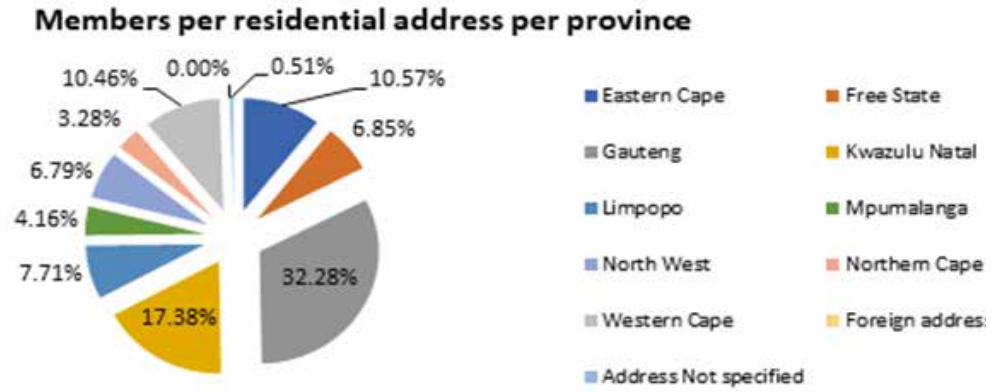


Figure 7 - Members per Residential Address per Province

### Geographical location of GEPF members and pensioners

The figure below reflect the geographical location of GEPF members:

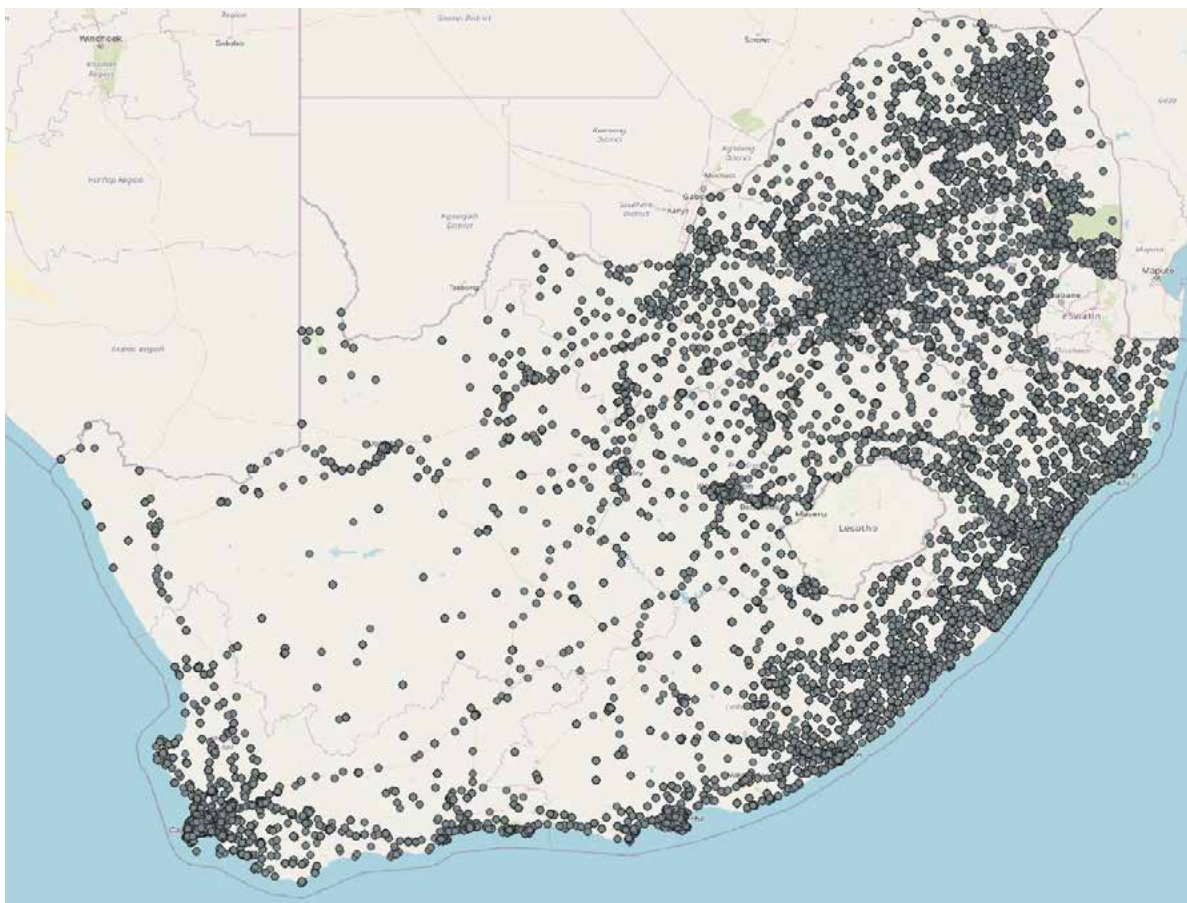


Figure 8: Geographical location of GEPF members

The figure below reflect the geographical location of GEPF pensioners:

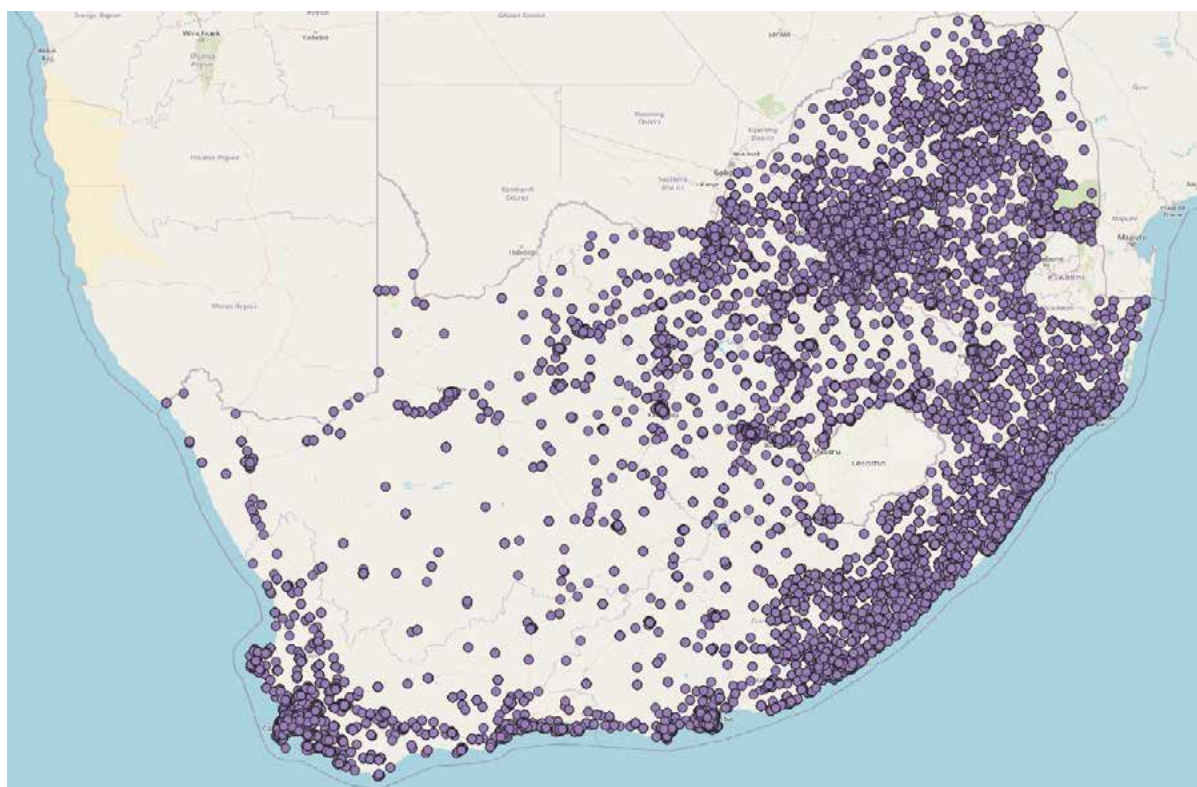


Figure 9: Geographical location of GEPF pensioners

## 2.11 ANALYSIS OF THE ROADSHOWS

Post COVID-19 lock down period, the total number of attendees for the remaining three roadshows for the financial year was 1435. The attendance breakdown is as follows: 49,97% (717 out of 1435) were active members, 14,49% (495 out of 1435) were pensioners, 3,97% (57 out of 1435) were beneficiaries, 0,91% (13 out of 1435) were spouse pensioners, 9,48% (136 out of 1435) were PDP members, 0,07% (1 out of 1435) were non-members and 1,11% (16 out of 1435) were not marked. Table 9 - Summary of the Total Number of Attendees (March 2022) depicts the targeted number versus actual attendance.

PROVINCE AND AREA NAME	DATE OF THE EVENT	TARGETED ATTENDANCE	ACTUAL ATTENDANCE
(WC) Beaufort West	4 Dec 2021	500	182
(EC) Lusikisiki	26 Feb 2022	1000	909
(GP) Soweto	26 Mar 2022	1000	344
TOTAL		2500	1435

Table 9 - Summary of the total number of attendees (March 2022)

As at 30 September 2022 (end of Quarter 2), the total number of attendees for the three GEPF Days was 1528. The attendance breakdown is as follows: 52.49% (802 out of 1528) were active members, 32.59% (498 out of 1528) were pensioners, 11.58% (177 out of 1528) were beneficiaries, 1.83% (28 out of 1528) were spouse pensioners, 1.51% (23 out of 1528) were non-members and 1,11%. Table 10 - Summary of the Total Number of Attendees (30 September 2022) depicts the targeted number versus actual attendance.

PROVINCE AND AREA NAME	DATE OF THE EVENT	TARGETED ATTENDANCE	ACTUAL ATTENDANCE
(LP) Jane Furse	20 May 2022	500	688
(FS) Bethlehem	30 Jul 2022	700	404
(MP) Piet Retief	27 Aug 2022	1000	436
TOTAL		2200	1528

Table 10 - Summary of the total number of attendees (30 September 2022)

## 2.12 ACHIEVE, PRESERVE AND AVOID (APA) ANALYSIS

The GPAA MANCO AND EXCO have set the goals and identified activities to Achieve, Preserve and Avoid. The details are presented in Table 11 - Achieve, Preserve and Avoid.

ACHIEVE	PRESERVE	AVOID
Clean data	Institutional knowledge	Silo working
Improved and automated processes through workflow	Resilient ICT systems	Audit Findings
Approved organisational structure that aligns with the needs of the GPAA business.	Awareness campaigns	Talk shops and blame games
Improved BPA and PCM	BPA and PCM	Legacy systems
Reliability interfaces safety web, SARS, Home Affairs	Employees' empowerment (bursaries and training) and Talent Management	Inconsistent messages to clients
Compressed value chain		Unnecessary document returns to employers
Decentralisation of claim processing		Paper usage / Printing
		Delays and reactive approach

Table 11 - Achieve, Preserve and Avoid

## 2.13 SWOT ANALYSIS

The GPAA MANCO AND EXCO 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 in Figure 10 – SWOT.



In the SWOT Analysis, the weaknesses were exploited as opportunities to develop strategies to overcome the vulnerabilities of the GPAA identified in the analysis.

These identified weaknesses have become opportunities that could yield short, medium or long-term benefits. The threats however include:

1. Cyber security and attacks that can lead to data loss or ransom, although this is an international threat, the GPAA has countermeasures and controls in place through Business Continuity Management and Information Security. This threat is expected and remains on the strategic and ICT risk radar with several controls in place to deter such attacks.
2. Clients/employers with outdated technology – Client education and front desk training.
3. Fraud - the GPAA has implemented an anti-corruption strategy and support the Government initiatives to curb corruption – This threat is on the strategic radar and is managed by increased controls, surveillance, and forensics with consequence management.
4. Electricity and water disruptions in regions could lead to loss of production – Most regions have been, and others are being equipped with emergency and alternate supplies however in long water outages this remains a threat.
5. COFI Bill and potential registration – The threat exists that if the COFI Bill becomes obligatory the GPAA will not be ready to yield financial services as required by the bill.





Figure 10: SWOT

## 2.14 REVISION TO LEGISLATIVE AND OTHER MANDATES

The legislation relevant to the administration of benefits by the GPAA had not changed at the time of preparing the 2023/2024 Annual Performance Plan (APP). The various benefits provided by the GPAA are governed by a number of acts, each of which has an effect on the manner in which the benefits are administered, and the related services provided. The funds and schemes that are currently administered by the GPAA and the relevant legislations that govern these schemes are listed in Table 12 - Legislations that govern Schemes and Funds Administered by the GPAA:

FUNDS AND SCHEMES:	APPLICABLE LEGISLATION:	ADMINISTERED ON BEHALF OF:
Government Employees Pension Fund (GEPF)	Government Employees Pension Law of 1996	GEPP'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

Table 12 - Legislations that govern Schemes and Funds Administered by the GPAA

## 2.15 COURT CASES

As of 31 January 2023, the GPAA had the following active cases. Table 13 - GPAA Active Cases provides the details of the cases.

NUMBER	LITIGATION IN RESPECT OF THE GPAA SPECIFICALLY
1	CATALINA INVESTMENT PTY (PTD) //GPA
2	GENESISBIZ GROUP SERVICES PTY (LTD) //GPAA
3	GPAA // CASPER COMBRINK ELECTRONICS CC t/a SECURITY INTEGRATED SYSTEMS

Table 13 - GPAA Active Cases





## **PART B RESOURCE CONSIDERATION**

# Part B – RESOURCE CONSIDERATION

## 1. Introduction

*The GPAA delivers on its strategic outcomes through its Annual Performance Plan and aims to improve its services to ensure better client experience. This includes the finalisation of the Modernisation Programme which will result in process automation and operational efficiencies.*

The organisation has identified the reduction of payment turnaround time (both internally and at employer departments) as one of the strategic outcomes to be prioritised in the next five (5) years. To achieve this, the GPAA is finalising the Modernisation Programme which will result in the implementation of the Benefits Payment Automation (BPA) system. The GPAA will ring-fence the Modernisation Programme budget to ensure that the spending on it is well defined and managed for accountability.

For continuity and resilience, the GPAA constantly reviews its Business Continuity strategies and plans to ensure minimal disruptions to its services. The resilience of the GPAA and its processes were evident throughout the Covid-19 pandemic period.

The GPAA continues to strive towards reducing the cost of administration and aims to have direct contact with its approximately 1.9 million clients, at a fraction of the comparative conventional costs. Management ownership of the Strategic Plan and service improvement initiatives are key to strengthening the ability to deliver quality services into the next decade.

## 2. Human Resources

To date, the GPAA organisation structure has not been finalised due to Modernisation being incomplete. Albeit the Human Resource structure is dependent on Modernisation and its purported efficiencies.

The GPAA currently employs approximately 1 067 employees, including long term contractors. To address the inequalities of the past, the GPAA has and is making amends by ensuring that one, people with disabilities are employed and well catered for in the GPAA buildings. Two, previously disadvantaged racial groups are employed according to the strategic output.

Currently the GPAA employs about 89% of blacks (Africans, Indians, Coloureds and Chinese). Three, to address inequality at senior management level, the recruitment processes are geared to ensure to the aforementioned is rectified by positioning female black staff at the helm. Four, addressing the issue of youth unemployment. Unfortunately, the GPAA is hamstrung and cannot simply employ more staff due to regulation. However, a concerted effort has been made to introduce a talent management programme and policy for upskilling internal youth. For external youth, the GPAA has introduced learnerships for TVET of eighteen months with a stipend and internships for university graduates of twenty-four months with a stipend.

### 3. Financial Resources

The GPAA has endeavoured in its supply chain principles to ensure that women owned companies, according to MTSF preferential procurement framework are prioritised. Currently, the GPAA has 21 fully women owned companies servicing the organisation. Another 16 partially women owned companies add to this achievement.

The GPAA receives 93 percent of its funding from the Government Employees Pension Fund and 7 percent from National Treasury. The revenue over the MTEF period is expected to be R1 376.7 million for 2023/24, R1 414.5million 2024/25 and R1 466million in 2025/26, providing a total of R4.257billion over the MTEF period. .

#### Programme 1 - Support Services

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 includes 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 walk in centre.

The 2023/24 budget for Programme 1 is R900.3million and will increase to R983.4million in 2025/26. 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.

#### Programme 2 - Benefit Administration

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

**Outcome 4:** Efficient Case Management which posits the assurance to clients and customer 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 is 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 lifecycle 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 turnaround time the entire cycle from submission to payment is shortened.

The 2023/24 budget for Programme 2 is R476.2million and will increase to R482 million in the 2025/26 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..

## Expenditure estimate

A Modernisation Programme Manager has been appointed and the budget will be ring fenced to allow for the control and management of expenditure in order to finalise and close out the programme. In 2022/23 the Modernisation Programme has been allocated R2.5 million. The allocation is required to appoint a Modernisation Programme Manager as agreed with the GEPE.

The expenditure for the Modernisation Programme for the MTEF period is projected as follows: R29.8 million for 2023/24 financial period, R46.9million for 2024/25 and R49million in 2025/26. The increase is based on estimated expenditure for integration with the envisaged system solutions that will allow the GPAA to finalise the road map for Modernisation. The three components that will be procured is a pension administration solution to replace the legacy system, a client relationship management solution, and a financial management solution to replace the General Ledger in the legacy CIVPEN system. The costs of these solutions will only be known after completion of a Request for Information (RFI) process to source indicative costs from the market.

The GPAA is aware of the dependency on service providers during the Modernisation transition. In line with government's call to reduce spending on consultants, the agency has appointed ICT contractors via the SITA RFB1193 framework and others on fixed term contracts to allow for the completion of the in-flight Modernisation projects. The same vehicle will be used for the implementing of the aforementioned solutions. Approval of the required budget was obtained from the GEPE. In this regard, the budget and the necessary motivation will be submitted as required, to allow for review and approval.

Expenditure for compensation of employees is expected to be as follows over the MTEF period: R641.5million for the 2023/24 financial period, R659.7million in 2024/25 and R683.2million in 2025/26. The expected increase is based on inflation projections and increases in the number of positions.



## GPAA Programmes expenditure

The expenditure estimates for Programme 1 and Programme 2 for 2023/2024 financial period is presented in Table 13 - Programme budgets over the 2020/2021 period following until 2025/2026:

Programme	Outcome	Audited Results			Allocated Budget	Medium-Term Expenditure Estimate		
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
		R'000	R'000	R'000	R'000	R'000	R'000	R'000
Programme 1: Support Services excluding ICT	1. Optimal core support.	706 746	834 380	690 823	794 250	900 373	950 335	983 485
	2. Capable and reliable administration system							
	3. Digitised processes							
Programme 2: Benefits Administration	4. Efficient case management	402 116	408 303	377 397	413 998	476 298	464 179	482 521
	5. Efficient admission management							
	6. Efficient contribution management							
	7. Payment turnaround time of less than 60 days							
<b>TOTAL</b>		<b>1 108 862</b>	<b>1 242 681</b>	<b>1068 220</b>	<b>1208 248</b>	<b>1 376 671</b>	<b>1 414 515</b>	<b>1 466 007</b>

Table 13 - Programme budgets

## GPAA Economic Classification Expenditure Analysis

The expenditure analysis per economic classification is presented in Table 14 - Economic classification expenditure :

	Audited Outcomes			Approved budget	Medium-Term Expenditure Estimate		
	'000	'000	'000	'000	'000	'000	'000
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Current payments							
Compensation of employees	563 187	592 164	568 511	610 535	641 565	659 736	683 201
Goods and services of which:	492 450	525 921	408 446	479 861	591 275	632 306	656 578
Communication	33 244	51 722	34 663	63 151	50 664	52 555	54 528
Computer services	158 261	132 211	70 890	103 062	124 077	126 500	129 546
Agency fees	-	-	-	9 080	12 583	13 143	13 732
Audit fees			3 600	4 000	6 000	6 267	6 548
Entertainment, Grocery and Catering	-	-	1 215	2 224	3 420	3 569	3 721
Consulting and professional services	89 404	136 199	112 794	113 941	137 128	163 226	170 540
Printing & Stationery	16 820	17 678	12 689	23 090	43 750	45 074	46 557
Lease payments	11 897	11 465	71 335	63 788	86 623	90 173	93 892
Repairs and maintenance	18 025	16 381	20 915	26 579	28 295	27 853	28 867
Advertising and Promotion	25 080	23 103	13 990	17 553	20 434	22 177	23 169
Training and workshops	8 679	10 884	10 216	7 355	10 226	10 637	11 055
Travel and subsistence	27 995	25 334	14 819	18 461	27 807	29 075	30 486
Other	136 289	152 666	32 240	31 157	30 117	31 454	32 863
Capital Expenditure	53 224	124 598	91 263	117 852	143 831	122 472	126 227
Total Expenditure	1 108 861	1 242 683	1 068 220	1 208 248	1 376 671	1 414 515	1 466 007

Table 14 - Economic classification expenditure





## PART C STRATEGIC RISK MANAGEMENT

# 06

# 1. 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 15 - GPAA's Strategic Risk Management depicts the GPAA risks and mitigations:

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTOR
<ul style="list-style-type: none"> <li>· Payment turn-around time of less than 60 days</li> <li>· Optimal Core Support</li> </ul>	Timely payment of benefits	Failure to pay benefits timely	<ol style="list-style-type: none"> <li>1. Internal turn-around times within the value chain are not adequately managed to allow for improved service delivery</li> <li>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</li> <li>3. Inefficient processes and systems to enable effective payment of benefits</li> <li>4. Inadequate business continuity plans to recover critical systems and functions in case of a disaster/crisis/emergency</li> <li>5. Lack of agility which could be linked to multitasking (Inadequate transferrable skills and institutional know how and ability to adapt)</li> <li>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</li> </ol>

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTOR
<ul style="list-style-type: none"> <li>· Capable and reliable administration system</li> <li>· Digitised processes</li> <li>· Efficient case management</li> <li>· Efficient admission management</li> <li>· Efficient contribution management</li> </ul>	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
			2.Change management not seen as 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
			2.Inadequate interventions to deal with worst performing employer departments
			3.Idealistic targets and turn-around times from Client Departments i.e., GEPP and National Treasury. SLA targets not aligned to institutional capacity
			4.Lack of formalized process to hold employer departments accountable
<ul style="list-style-type: none"> <li>· Capable and reliable administration system</li> <li>· Digitised Processes,</li> <li>· Efficient case management</li> <li>· Efficient admission management</li> <li>· Efficient contribution management</li> <li>· Payment turn-around time of less than 60 days</li> </ul>	Technology Risk	Technology Obsolescence, which might impact negatively on strategy execution	Pension administration system (CIVPEN) will reach end of life in 2years. There is currently no contingency plan in place should the system collapse before it is replaced

OUTCOMES	RISK NAME	RISK DESCRIPTION	CONTRIBUTING FACTOR
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 and the GPAA is regulated by rules of the public sector, which limits flexibility and competitive.
			2.Ineffective processes and systems
			3.Requirement for government departments to use SITA for ICT services which limits ability of GPAA 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 filling of critical and senior leadership positions	Extended recruitment process due to the DPSA requirements

Table 15 - GPAA's Strategic Risk Management

## 2 Strategic Planning Process

To embrace government's outcomes-based approach, the GPAA's mandate has been depicted through a strategy map.

### Overview

This approach provides for an evaluation of the internal, external and locative efficiency of each output, as well as of the budget programme. This organisational framework provides for various types of evaluations that link inputs to activities, outputs, outcomes and impacts.

Over the medium-term, the GPAA will initiate various projects, the format of which can be evaluated through all phases - from diagnosis to implementation and impact. The National Evaluation Plan intervention as advocated by the Department of Planning, Monitoring and Evaluation (DPME) is geared at profiling evaluation plans for projects that are of national importance and can solicit opportunities for resource sharing, given the fact that delivery on the GPAA's mandate requires a cross-sectorial approach. It is on this basis that the results-based approach has been embedded in the GPAA's planning instruments as depicted in Figure 11 - GPAA's Strategic Planning Methodology.



## Strategic Planning methodology

The GPAA's planning methodology is depicted in Figure 11 - GPAA's Strategic Planning Methodology: as adapted from the DPME Framework on Strategic Planning and Monitoring.

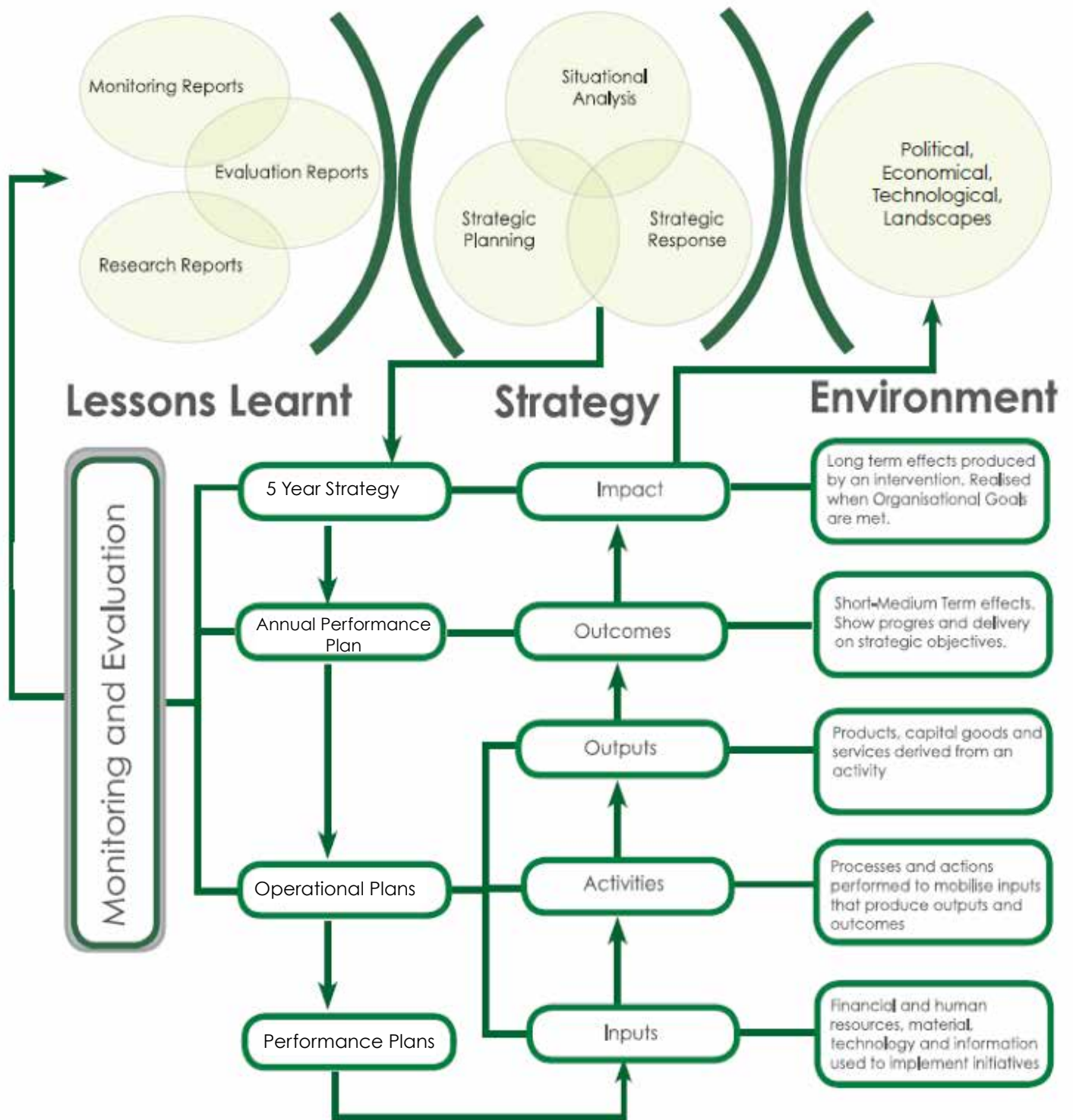
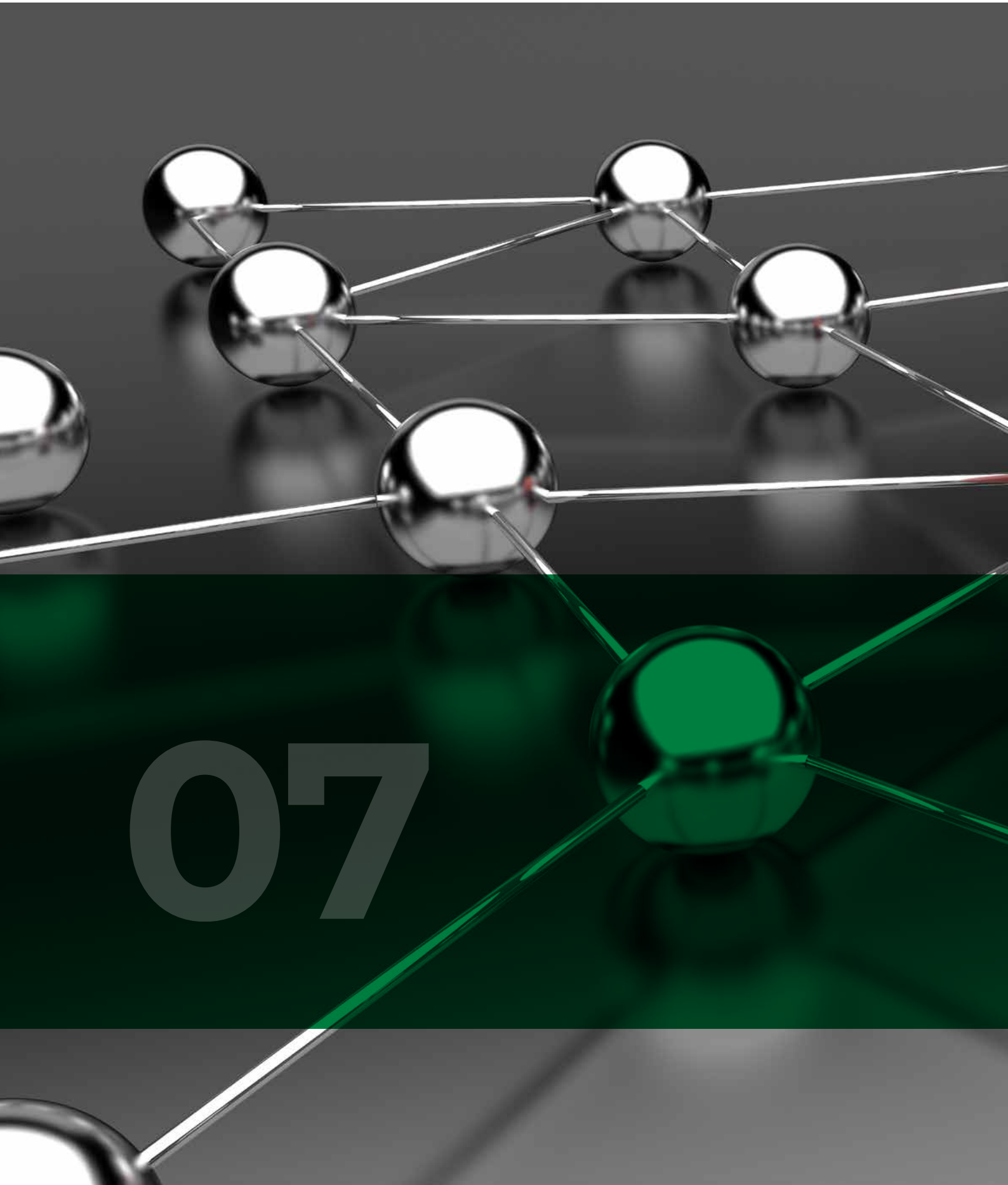


Figure 11 - GPAA's Strategic Planning Methodology





**PART D:  
PROGRAMME AND  
SUB-PROGRAMME PLANS**

## PART D - PROGRAMME AND SUB-PROGRAMME PLANS

### PROGRAMME 1 – SUPPORT SERVICES TARGETS

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. Table 16 - Programme 1: Support Services Indicators is a representation of Programme 1 Support Services targets from 2020/21 to 2026/27.

Purpose: To provide support to core business to deliver quality service to GPAA customers and clients

Links	Outcome	Item	Output
Priority 6: A capable, ethical and developmental state.		1	Disabled 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.	Outcome: 1	2	Female employees at GPAA
Priority 6: A capable, ethical and developmental state.		3	Black employees at GPAA
Priority 6: A capable, ethical, and developmental state.		Optimal core support	4
	5		Valid Invoices paid within 30 working days
	6		Reduced Unclaimed Benefits
	7		Clients reached through Digital Communication channel
	Outcome: 3	8	ICT systems up-time
	Optimal core support		

Table 16 - Programme 1: Support Services Indicators

Output Indicators	Audited/ Actual Performance		Estimated Target	Planned Targets	National Treasury Strategic Framework		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
% of disabled employees as total employees	6.05%	5.74%	2%	2%	2%	2%	2%
% of female employees as total employees	63.67%	63.09%	51%	51%	51%	51%	51%
% of black employees as total employees	83.14%	90.20%	92%	92%	92%	92%	92%
Clean audit achieved in Quarter 3 of the next financial year	Unqualified audit	Unqualified audit	Clean audit	Clean audit	Clean audit	Clean audit	Clean audit
% of accurate payment of valid invoices paid within 30 working days	97.09%	99.32%	100%	100%	100%	100%	100%
% of all amounts in Unclaimed Benefits paid (excluding interest)	43.16%	42.52%	50%	60%	70%	70%	75%
% clients reached through Digital Communication channel	37.89%	56.30%	55%	55%	70%	70%	70%
% of time ICT system is available during required times per quarter	99.58%	99.89%	97%	97%	97%	97%	97%

**Programme 1:  
Support Services – Annual Performance Indicators and quarterly targets  
for 2023/24**

Item	Output Indicators	2022/2023 Planned Target	2023/24 Annual Target	2023/24 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%	92%	92%	92%	92%	92%
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)	50%	60%	10%	25%	35%	60%
7.	% clients reached through Digital Communication channel	55%	55%	55%	55%	55%	65%
8.	% of time ICT system is available during required times per quarter	97%	97%	97%	97%	97%	97%

Table 17 - Programme 1 Support Services Quarterly Targets

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

	2023/24 Budget	2023/24 Quarterly budget				
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Programme 1: Support Services	900 373 285	225 093 321	225 093 321	225 093 321	225 093 321	900 373 285

Table 18 - Reconciling Performance Target with the Budget and MTEF: Programme 1 Support Services

Programme 1: Support Services administers the business and governance affairs of the GPAA, to ensure that the mandate of the organisation is executed in an efficient and effective manner. It has thus identified the eight output indicators which contributes towards the following outcomes (Outcome 1-Optimal core support, Outcome 2- Capable and reliable administration and Outcome 3- Digitised processes) as defined in the Strategic Plan 2020 / 2021 – 2024/2025.

## PROGRAMME 2 – BENEFITS ADMINISTRATION

Programme 2 administers a range of benefits and is responsible for client relationship management Table 19 - Programme 2: Benefits Administration from 2020/21 to 2026/27.

Purpose: Programme 2 consists of three sub-programmes that administer a range of benefits and are responsible for client relationship management.

Links	Outcome	Item	Output	Output Indicator	
A capable, ethical and developmental state.	Outcome 7: Payment turn-around time of less than 60 days	9	Satisfied clients	% client satisfaction levels	
		10	Resolved calls	% calls resolved versus calls answered	
Priority 5: Social cohesion and safe communities	Outcome: 5 Efficient admission management	11	NT members admitted within 14 working days	% of NT members admitted within 14 working days	
		12	GEPF members admitted within 14 working days	% of GEPF members admitted within 14 working days	
	Outcome: 6 Efficient contribution management	13	GEPF contributions received and reconciled by the 22nd of the month	% of 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	% of NT clients records maintained within 21 working days	
		15	NT suspended pensioners overseas) reinstated within 21 working days after receipt of Life Certificates	% of NT suspended pensioners (overseas) reinstated within 21 working days after receipt of Life Certificates	



	Audited/ Actual Performance		Estimated Target	Planned Target	National Treasury Strategic Framework		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
	94%	81.25%	90%	90%	98%	98%	98%
	65%	45.90%	66%	66%	80%	80%	80%
	99,98%	98.82%	98%	99,98%	99,98%	99,98%	99,98%
	97%	100%	98%	98%	98%	98%	98%
	97%	99.98%	98%	97%	95% to member level	95% to member level	95% to member level
	99,98%	99.82%	99%	99,98%	99,98%	99,98%	99,98%
	99,98%	99.56%	99%	99,98%	99,98%	99,98%	99,98%

Links	Outcome	Item	Output	Output Indicator	
	Outcome 7: Payment turn-around time of less than 60 days	16	NT membership certificates issued within 30 working days of admission	% of NT membership certificates issued within 30 working days of admission	
		17	NT Death benefits paid within 60 working days after duly completed documents were received	% of NT Death benefits paid within 60 working days after duly completed documents were received	
		18	GEPF benefits paid within 45 working days of liability date, excluding Death benefits after receiving duly completed documents.	% GEPF benefits paid within 45 working days liability date, excluding Death benefits after receiving duly completed documents	
		19	NT benefits paid within 20 working days after receipt of duly completed documents excluding Death benefits	% of NT benefits paid within 20 working days after receipt of duly completed documents excluding Death benefits	
		20	Visitors serviced	% of visitors serviced versus number of visitors	
		21	GEPF death benefits paid within 60 working days of liability date after duly completed documents were received	% of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received	

	Audited/ Actual Performance		Estimated Target	Planned Target	National Treasury Strategic Framework		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
	99,98%	99.90%	99%	99,98%	99,98%	99,98%	99,98%
	80%	93.58%	90%	90%	90%	90%	90%
	85%	76.52%	86%	87%	87%	87%	87%
	87%	99.98%	89%	90%	91%	91%	91%
	97%	99.86%	92%	94%	95%	95%	95%
	50%	28.69%	60%	60%	70%	70%	70%

Links	Outcome	Item	Output	Output Indicator	
	Outcome: 6 Efficient contribution management	22	TEPF contributions received and reconciled by the 22nd of the month.	% of TEPF contributions received and reconciled by the 22nd of the month.	
		23	AIPF contributions received and reconciled by the 22nd of the month	% of 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	% of AIPF benefits paid within a set period (45 working days) of liability date after receipt of duly completed documentation.	
		25	TEPF benefits paid within a set period (45 working days) of receipt of duly completed documentation	% of TEPF benefits paid within a set period (45 working days) of liability date after receipt of duly completed documentation.	

Table 19 - Programme 2: Benefits Administration

	Audited/ Actual Performance		Estimated Target	Planned Target	National Treasury Strategic Framework		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
New measure	131.09%	98%	97%	97%	97%	97%	97%
New measure	99.23%	98%	97%	97%	97%	97%	97%
New measure	16.16%	86%	87%	87%	87%	87%	87%
New measure	11.11%	86%	87%	87%	87%	87%	87%

## Programme 2 Benefits Administration – Annual Performance Indicators and Quarterly Targets for 2023/24

Item	Performance Indicator	2022/2023	2023/24	2023/2024 Quarterly Targets			
		Planned Target	Annual Target	Q1	Q2	Q3	Q4
9.	% of client satisfaction levels	90%	90%	90%	90%	90%	90%
10.	% of first contact calls resolved versus calls answered excluding escalated calls	66%	66%	66%	66%	66%	66%
11.	% of NT members admitted within 14 working days	98%	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 <sup>nd</sup> of the month	98%	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.	% GEPF benefits paid within 45 working days liability date, excluding Death benefits after receiving duly completed documents	86%	87%	87%	87%	87%	87%
19.	% of NT benefits paid within 20 working days after receipt of duly completed documents excluding death benefits	89%	90%	90%	90%	90%	90%
20.	% of visitors serviced versus number of visitors	92%	94%	94%	94%	94%	94%
21.	% of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received	60%	60%	60%	60%	60%	60%
22.	% of TEPF contributions received and reconciled by the 22 <sup>nd</sup> of the month.	98%	97%	97%	97%	97%	97%
23.	% of AIPF contributions received and reconciled by the 22 <sup>nd</sup> of the month.	98%	97%	97%	97%	97%	97%
24.	% of AIPF benefits paid within a set period (45 working days) of liability date after receipt of duly completed documentation.	86%	87%	87%	87%	87%	87%
25.	% of TEPF benefits paid within a set period (45 working days) of liability date after receipt of duly completed documentation.	86%	87%	87%	87%	87%	87%

Table 20 - Programme 2 Benefits Administration Quarterly Targets

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

	2023/24 budget	2023/24 Quarterly budget				
		Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Programme 2: Benefits Administration	476 298 505	119 074 626	119 074 626	119 074 626	119 074 626	476 298 505

Table 21 - Reconciling Performance Targets with the Budget and MTEF: Programme 2 Benefits Administration

Programme 2: Benefits Administration with its three sub-programmes (Sub-programme 2.1. Special Pensions, Military and Other Benefits, Sub-programme 2.2. Employees Benefits and Sub-programme 2.3. Client Relationship Management) are responsible for implementing the mandate of the GPAA. For the period 2023/2024, 17 indicators (refer to table 13) with targets have been identified to ensure that the GPAA is efficient in case, admission and contribution management, while also reducing the payment turnaround to less than 60 days.

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## **PART E**

# **LINKS TO OTHER PLANS**

The GPAA has no links to other plans.



# LIST OF ANNEXURES

ANNEXURE A - TECHNICAL INDICATOR DISCRPTIONS

## ANNEXURE A - TECHNICAL INDICATORS

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

### Indicator 1 - Owner – Chief Director: Human Resources

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 system
Method of calculation/ assessment	$\% \text{ of disabled employees} = \text{number of disabled employees} / \text{GPAA Total employees} * 100$
Means of verification	Employment equity status report that reflects the GPAA's employees with disabilities
Assumptions	<ul style="list-style-type: none"> <li><input type="checkbox"/> That employees will disclose their disability</li> <li><input type="checkbox"/> The recruitment process will yield suitably qualified disabled candidates</li> </ul>
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

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 and the PERSAL system.
Method of calculation/ assessment	$\% \text{ of female employees as total employees} = \text{number of Female employees} / \text{GPAA total employees} * 100$
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

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"> <li><input type="checkbox"/> Who are citizens of the Republic of South Africa by birth or descent; or</li> <li><input type="checkbox"/> Who became citizens of the Republic of South Africa by naturalization-</li> <li><input type="checkbox"/> Before 27 April 1994; or</li> <li><input type="checkbox"/> On or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date.</li> </ul>
Purpose/importance	To ensure that suitably black employees have equal opportunities to employment and are equitably represented
Source/collection of data	Employment Equity plan and the PERSAL system
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 Outcome (External audit outcome)
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	Review 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	$\% \text{ of valid and accurate invoices paid within 30 working days} = \frac{\text{total accurate invoices paid by the GPAA}}{\text{total valid and accurate invoices received}} * 100$
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> <ul style="list-style-type: none"> <li>□ 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: <ul style="list-style-type: none"> <li>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</li> <li>o A pending benefit transfer to another retirement fund.</li> </ul> </li> </ul>
Purpose / importance	To track the percentage of Unclaimed Benefits paid excluding interest
Source / collection of data	Ledger
Method of calculation	$\% \text{ of all amounts in Unclaimed Benefits paid (excluding interest)} = \frac{\text{Total Unclaimed Benefits amount paid in the current reporting period}}{(\text{unclaimed benefits amounts at the beginning of the current reporting period} + \text{new unclaimed benefits amounts transferred in the current reporting period})} * 100$
Means of verification	Review the total Unclaimed Benefits report for the unclaimed benefits amounts paid at the end of current reporting period against (the Unclaimed Benefits amounts at the beginning of the current reporting period plus new unclaimed benefits amounts transferred in the current reporting period)
Assumptions	<p>That we have tracing capacity, no fraud attempts and internal control limitations</p> <p>100% 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 (Year to date)
Reporting cycle	Quarterly
Desired performance	Decreased Unclaimed Benefits account

## Indicator 7 - Owner – Chief Director: Strategic Support 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	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 contact data.
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 client experience



## Indicator 8 - Owner - Chief Information Officer

Indicator title	% of time 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 and ICT OLA/SLA Reports
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	Review 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	% 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><math>n_{\text{Call Centre}} + n_{\text{Emails}} + n_{\text{Mobile}} + n_{\text{Outreach}} + n_{\text{Walkincentre}} = \text{variables}</math></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	% calls resolved versus calls answered
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, memberletters, 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	System generated report (To be developed)
Method of calculation	$\% \text{ of calls resolved versus calls answered} = \frac{\text{total number of calls resolved}}{\text{total number of calls answered}} * 100$
Means of verification	Review agent wrap up data report for resolved calls.
Assumptions	<p>100% 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 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 spread sheets
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)  % of NT members admitted within 14 days = Total number of NT members admitted within 14 working days after receipt of duly completed documentation / Total NT members recieved 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. Turn-around time between received and admitted
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 spread sheets.
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. Turn-around time between received and admitted.
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.  $\% \text{ of GEPF contributions received and reconciled by the 22nd of the month} = \frac{\text{contribution reconciled by the 22 of the month}}{\text{contributions payable}} * 100$
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. Stretch 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><math>\% \text{ of NT clients records maintained within 21 working days} = \text{NT clients records requiring maintenance (updating) maintained (updated) within 21 days} / \text{NT pensioner records requiring maintenance (updating) received} * 100</math></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 reinstated NT suspended foreign or manual pensioners 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	Spread sheet 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 or database on the system. Comparison between those reinstated within 21 working days of receipt of Life Certificates and all those whose Life Certificates were received.
Assumptions	100% 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 spread sheet 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	100% 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 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, MIS, turnaround times spread sheets
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 MIS 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.
Assumptions	100% 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 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 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 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.  $\% \text{ of GEPF benefits paid within 45 working days of liability date (excluding Death benefits) after duly completed documents} = \frac{\text{Total GEPF benefits paid (excluding Death benefits) within 45 working days of liability date on receipt of duly correctly completed documents}}{\text{Total GEPF benefits received (excluding Death benefits)}} * 100$
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the MIS summary report received (excluding Death benefits) and compare to OBIEE MIS report
Assumptions	100% 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 (NB: Annual achievement is average of all quarters)
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, MIS, turnaround times spread sheets
Method of calculation	Total paid within 20 working days of receipt of correctly completed documents as a percentage of claims paid during reporting period.  % of NT benefits paid within 20 working days (excluding Death benefits) = Total NT benefits paid within 20 working days of receipt of correctly completed documents / Total NT benefits recieved * 100
Means of verification	Review MIS report for the turnaround time taken to process newly received cases, variables to be taken into consideration is date when case is received and date when case is paid.
Assumptions	100% 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 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	System generated report (QMSI)
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	100% 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, MIS, turnaround times spread sheets
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  $\% \text{ of GEPF Death benefits paid within 60 working days of liability date after duly completed documents were received} = \frac{\text{Total Deaths benefits paid within 60 working days of liability date after receipt of duly correctly completed documents}}{\text{Total Death benefits recieved}} * 100$
Means of verification	Review MIS report for the 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.
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 and no impact of Covid-19 to the GPAA
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  $\% \text{ of AIPF contributions received and reconciled by the 22nd of the month} = \frac{\text{contribution reconciled by the 22 of the month}}{\text{contributions payable}} * 100$
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 department compliance and no impact of Covid-19 to the GPAA
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 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
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.  $\% \text{ of AIPF benefits paid within 45 working days after duly completed documents} = \frac{\text{Total AIPF benefits paid (excluding Death benefits) within 45 working days of receipt of duly correctly completed documents}}{\text{Total AIPF benefits recieved}} * 100$
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the MIS summary report received and compare against OBIEE MIS report.
Assumptions	100% system up-time and availability and no impact of Covid-19 to the GPAA.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative (NB: Annual achievement is the average of all quarters)
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 receipt of duly completed documentation (excluding Death)
Definition	The indicator measures the percentage of TEPF benefits that have been paid within the specified timeframes during the reporting period (excluding Death benefits)
Purpose / importance	To track whether TEPF 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.  % of TEPF benefits paid within 45 working days (excluding Death benefits) after duly completed documents = Total TEPF benefits paid (excluding Death benefits) within 45 working days of receipt of duly correctly completed documents / Total TEPF benefits recieved (excluding Death benefits) * 100
Means of verification	Review a total list of members paid against total number of those paid within 45 working days from the MIS summary report received (excluding death benefits) and compare against OBIEE MIS report.
Assumptions	100% system up-time and availability and no impact of Covid-19 to the GPAA.
Disaggregation of beneficiaries (where applicable)	N/A
Spatial transformation (where applicable)	N/A
Data limitations	System downtime and availability
Calculation type	Non-cumulative (NB: Annual achievement is the average of all quarters)
Reporting cycle	Quarterly
Desired performance	Increase in the percentage of benefits that were paid

## ANNEXURE B - AMMENDMENT TO THE STRATEGIC PLAN

The GPAA has made no amendments to its Strategic Plan 2020/2021 – 2024/2025 Financial Years.

## GLOSSARY OF TERMS AND ABBREVIATIONS

Term	Abbreviation
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 Employers	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. Any government entity employing persons into government services.
External audit GEP LAW	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. 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	Abbreviation
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.

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