

Sundays River Valley Municipality

Appendix A



PERFORMANCE AGREEMENT

MADE AND ENTERED INTO BY AND BETWEEN:

**THE MUNICIPALITY OF SUNDAYS RIVER VALLEY
AS REPRESENTED BY THE MAYOR**

CLLR N. BIXA

AND

**MR. SS FADI
THE EMPLOYEE OF THE MUNICIPALITY**

MUNICIPAL MANAGER

FOR THE

FINANCIAL YEAR: 1 JULY 2021 - 30 JUNE 2022

Performance Agreement – Mr. SS Fadi

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- 2.3 To specify accountabilities as set out in the Performance Plan (Annexure A);
2.2 To specify objectives and targets established for the Employee and to communicate to the Employee's expectations of the Employee's performance expectations and accountabilities;
2.1 To comply with the provisions of Section 57(1)(b), (4A) and (5) of the Systems Act as well as the Contract of Employment entered into between the parties;

2. PURPOSE OF THIS AGREEMENT

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

1. INTRODUCTION

WHEREBY IT IS AGREED AS FOLLOWS:

Mr. SS Fadi an Employee of the Municipality of Sundays River (hereinafter referred to as the Employee).

and

The Municipality of Sundays River herein represented by Mrs. N Bixa in his capacity as Mayor (hereinafter referred to as the Employer)

ENTRED INTO BY AND BETWEEN

PERFORMANCE AGREEMENT

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- 2.4 To monitor and measure performance against set targeted outputs and outcomes;
- 2.5 To appropriately reward the Employee in accordance with the Employer's performance management policy in the event of outstanding performance;
- 2.6 To establish a transparent and accountable working relationship; and
- 2.7 Give effect to the Employer's commitment to a performance-orientated relationship with the Employee in attaining equitable and improved service delivery.

3. COMMENCEMENT AND DURATION

- 3.1 This Agreement will commence on the 01 July 2021 and will remain in force until 30 June 2022 where after a new Performance Agreement, Performance Plan and Personal Development Plan shall be concluded between the parties for the next financial year or any portion thereof.
- 3.2 The parties will review the provisions of this Agreement during June each year. The parties will conclude a new Performance Agreement and Performance Plan that replaces this Agreement at least once a year by not later than the 31 of July of the succeeding financial year.
- 3.3 This Agreement will terminate on the termination of the Employee's contract of employment for any reason; and
- 3.4 The content of this Agreement may be revised at any time during the above-mentioned period to determine the applicability of the matters agreed upon.
- 3.5 If at any time during the validity of this Agreement the work environment alters (whether as a result of government or council decisions or otherwise) to the extent that the contents of this Agreement are no longer appropriate, the contents shall immediately be revised.

4. PERFORMANCE OBJECTIVES

- 4.1 The Performance Plan (Annexure A) sets out –
 - 4.1.1 The performance objectives and targets that must be met by the Employee; and
 - 4.1.2 The time frames within which those performance objectives and targets must be met.

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- 5.6 The criteria upon which the performance of the Employee shall be assessed shall consist of two components, both of which shall be contained in the Performance Agreement.
- 5.5 The Employee undertakes to submit performance evidence in a format the Employer may require at times and intervals as set out herein in order to enable the Employer to evaluate the performance of the Employee.
- 5.4 The Employee undertakes to actively focus towards the promotion and implementation of the Key Performance Areas KPA's (including special projects relevant to the employee's responsibilities) within the local government framework.
- 5.3 The Employer will consult with the Employee about the specific performance standards that will be included in the performance management system applicable to the Employee.
- 5.2 The Employee accepts that the purpose of the performance management system will be to provide a comprehensive system with specific performance standards to assist the Employer, management and municipal staff to perform to the standards required.
- 5.1 The Employee agrees to participate in the performance management system that the Employer adopts or introduces for the Employer, management and municipal staff of the Employer.

5. PERFORMANCE MANAGEMENT SYSTEM

- 4.4 The Employee's performance will, in addition, be measured in terms of contributions to the goals and strategies set out in the Employer's Integrated Development Plan.
- 4.3 The key objectives describe the main tasks that need to be done. The key performance indicators provide the details of the evidence that must be provided to show that a key objective has been achieved. The target dates describe the timeframe in which the work must be achieved. The weightings show the relative importance of the key objectives to each other.
- 4.2 The performance objectives and targets reflected in Annexure A are set by the Employer in consultation with the Employee and based on the integrated Development Plan, Service Delivery and Budget Implementation Plan (SDBIP) and the Budget of the Employer, and shall include key objectives; key performance indicators; target dates and weightings.
- 4.1.3 The core competency requirements (Annexure C) defined as the management skills regarded as critical to the position held by the employee.

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- 5.6.1 The Employee must be assessed against both components, with a weighting of 80:20 allocated to the Key Performance Areas (KPA's) and the Core Managerial Competencies (CMC's) respectively.
- 5.6.2 Each area of assessment will be weighted and will contribute a specific part to the total score.
- 5.6.3 KPA's covering the main areas of work will account for 80% and CMC's will account for 20% of the final assessment.
- 5.7 The Employee's assessment will be based on his/her performance in terms of the outputs/outcomes (performance indicators) identified as per attached Performance Plan (Annexure A), which are linked to the KPA's, and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee:

NO.	KEY PERFORMANCE AREAS (Strategic Objectives)	WEIGHTING
1	Basic Services delivery and Infrastructure Development	20
2	Institutional transformation and organisation development	20
3	Local Economic Development	5
4	Good Governance and Public Participation	30
5	Community and Social Services	5
6	Financial viability and Management (Including financial management functions in terms of section 62 of the MFMA)	20

- 5.8 The CMC's will make up the other 20% of the Employee's assessment score. CMC's that are deemed to be most critical for the Employee's specific job are reflected in the list below as agreed to between the Employer and Employee:

CCR No	Core Competency Requirement	Weight
Core Managerial Competencies		
1	Strategic Leadership and Management	10
2	Programme and Project Management	5
3	Financial Management	20
4	Risk and Change Management	10
5	Governance, Ethics and Values in financial management	5
6	Financial and Performance Reporting	5
7	Legislation, Policy Conceptualisation and implementation	10

- N.C. 11/11/2021
- 6.1 The Performance Plan (Annexure A) to this Agreement sets out –
- 6.1.1 The standards and procedures for evaluating the Employee's performance; and
- 6.1.2 The intervals for the evaluation of the Employee's performance.
- 6.2 Despite the establishment of agreed intervals for evaluation, the Employer may in addition review the Employee's performance at any stage while the contract of employment remains in force.
- 6.3 Personal growth and development needs identified during any performance review discussion must be documented in a Personal Development Plan as well as the actions agreed to and implementation must take place within set time frames.
- 6.4 The Employee's performance will be measured in terms of contributions to the goals and strategies set out in the Employer's Integrated Development Plan (IDP).
- 6.5 Assessment of the achievement of results as outlined in the performance plan:
- 6.5.1 Each KPA should be assessed according to the extent to which the specified standards have been met.
- 6.5.2 An indicative rating on the five-point scale should be provided for each due regard to ad hoc tasks that had to be performed under the KPA.
- 6.5.3 An overall score will be calculated based on the total of individual scores KPA.
- 6.6 Assessment of the CMCs or CCRs
- 6.6.1 Each CMC should be assessed according to the extent to which the specified standards have been met.
- 6.6.2 An indicative rating on the five-point scale should be provided for each CMC.
- 6.6.3 An overall score will be calculated based on the total of individual scores calculated above

6. PERFORMANCE ASSESSMENTS

8	Partnership and Stakeholder Relations	5	Total (Cannot exceed 100%)	100
9	Supply Chain Management	20	Audit and Assurance	10
10	Sundays River Valley Municipality	10		

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6.7 Overall rating

- 6.7.1 An overall rating is calculated by adding the overall scores as calculated in 6.5.3 and 6.6.3 above; and
- 6.7.2 Such overall rating represents the outcome of the performance appraisal.

6.8 The assessment of the performance of the Employee will be based on the following rating scale for KPA's and CMCs:

Level	Terminology	Description	Rating 1-5
5	Outstanding performance	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance plan and maintained this in all areas of responsibility throughout the year. For individual KPIs the performance is 100% and above of the set target.	150%- 159% Bonus of 10-12% 160%-167% Bonus of 13-14%
4	Performance significantly above expectations	Performance is significantly higher than the standard expected in the job. The appraisal indicates that the Employee has achieved above fully effective results against more than half of the performance criteria and indicators and fully achieved all others throughout the year. For individual KPIs the performance is 50%-99% above the set target	130-139% Bonus of 5-7% 140-149% Bonus of 8-9%
3	Fully effective	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the employee has fully achieved effective results against all significant performance criteria and indicators as specified in the Performance Agreement and Performance Plan.	<130%
2	Not fully effective	Performance is below the standard required for the job in key areas.	<130%

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

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7. SCHEDULE FOR PERFORMANCE REVIEWS

- 6.9.1 Executive Mayor;
- 6.9.2 Chairperson of the Audit Committee or performance management expert of audit committee;
- 6.9.3 Member of the Mayoral Committee or Executive Committee; and
- 6.9.4 Mayor and/or Municipal Manager from another Municipality.
- 6.9.5 Member of a ward committee as nominated by the Executive Mayor
- For purposes of evaluating the performance of the Employee, an evaluation panel constituted of the following persons will be established –

<p>Performance meets some of the standards expected for the job. The Employee has achieved below expected results against almost all of the review/assessment indicators that they expect for the job. The Employee has achieved below expected results against more than half effective results against below fully effective results against less than half effective results against criteria and indicators specified in the Performance Agreement and PP.</p>	<p>Unacceptable</p>	<p>1</p>	<p>Performance does not meet the standard expected for the job. The Employee has failed to demonstrate the ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.</p>
<p>Performance does not meet the standard expected for the job. The Employee has failed to demonstrate the ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.</p>	<p>Unacceptable</p>	<p>2</p>	<p>Performance does not meet the standard expected for the job. The Employee has failed to demonstrate the ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.</p>

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Quarter	Review Period	Review to be completed by
1	July – September	30 October 2021
2	October-December	30 January 2022
3	January-March	30 April 2022
4	April-June	30 July 2022

- 7.2 The Employer shall keep a record of the mid-year review and annual assessment meetings.
- 7.3 Performance feedback shall be based on the Employer's assessment of the Employee's performance.
- 7.4 The Employer will be entitled to review and make reasonable changes to the provisions of Annexure A from time to time for operational reasons. The Employee will be fully consulted before any such change is made.
- 7.5 The Employer may amend the provisions of Annexure A whenever the performance management system is adopted, implemented and/or amended as the case may be. In that case, the Employee will be fully consulted before any such change is made.

8. DEVELOPMENTAL REQUIREMENTS

The Personal Development Plan (PDP) for addressing developmental gaps is attached as Annexure B. Such Plan may be implemented and/or amended as the case may be after each assessment. In that case, the Employee will be fully consulted before any such change or plan is made.

9. OBLIGATIONS OF THE EMPLOYER

- 9.1 The Employer shall-
 - 9.1.1 Create an enabling environment to facilitate effective performance by the employee;
 - 9.1.2 Provide access to skills development and capacity building opportunities;
 - 9.1.3 Work collaboratively with the Employee to solve problems and generate solutions to common problems that may impact on the performance of the Employee;

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- 11.4.1 Provide systematic remedial or developmental support to assist the Employee to improve his or her performance; and
- 11.4.2 After appropriate performance counseling and having provided the necessary guidance and/or support as well as reasonable time for assessment rating calculator.
- 11.4 In the case of unacceptable performance, the Employer shall –
- 11.3 A performance bonus of between 5% and 14% of the inclusive annual remuneration package may be paid to the Employee in recognition of outstanding performance. In determining the performance bonus the relevant percentage is based on the overall rating, calculated by using the applicable assessment rating calculator.
- 11.2 A performance bonus may be paid to the Employee in recognition of outstanding performance. Such bonus will be determined in terms of this Agreement.
- 11.1 The evaluation of the Employee's performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.

11. MANAGEMENT OF EVALUATION OUTCOMES

- 10.2 The Employer agrees to inform the Employee of the outcome of any decisions taken pursuant to the exercise of powers contemplated in clause 11.1 as soon as practicable to enable the Employee to take any necessary action with delay.

- 10.1.3 A substantial financial effect on the Employer.

- 10.1.2 Commit the Employee to implement or to give effect to a decision made by the Employer; and

- 10.1.1 A direct effect on the performance of any of the Employee's functions;

- 10.1 The Employer agrees to consult the Employee timely where the exercising of the powers will have amongst others-

10. CONSULTATION

- 9.1.5 Make available to the Employee such resources as the Employee may reasonably require from time to time assisting him/her to meet the performance objectives and targets established in terms of this Agreement.
- 9.1.4 On the request of the Employee delegate such powers reasonably required by the Employee to enable him/her to meet the performance objectives and targets established in terms of this Agreement; and

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improvement in performance, the Employer may consider steps to terminate the contract of employment of the Employee on grounds of unfitness or incapacity to carry out his or her duties.

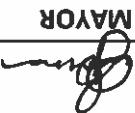
12. DISPUTE RESOLUTION

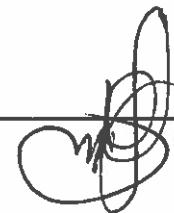
- 12.1 Any disputes about the nature of the Employee's performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/or any other matter provided for, shall be mediated by:-
 - 12.1.1 The Mayor of the Employer within thirty (30) days of receipt of a formal written dispute from the Employee provided that where the dispute relates to the outcome of the performance evaluation the Mayor shall appoint a member of Council to consider submissions on performance whose decision shall be final and binding.
- 12.2 Any disputes about the outcome of the Performance Evaluations shall within thirty (30) days of receipt of a formal written dispute from the Employee be mediated by a member of the Sundays River Valley Municipal Council, provided that such Councillor was not part of the evaluation panel contemplated in paragraph 7 herein, whose decision shall be final and binding on both parties.
- 12.3 In the event that the mediation process contemplated above fails, the relevant clause of the Contract of Employment shall apply.

13. GENERAL

- 13.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A may be made available to the public by the Employer.
- 13.2 Nothing in this agreement diminishes the obligations, duties or accountabilities of the Employee in terms of his/her contract of employment, or the effects of existing or new regulations, circulars, policies, directives or other instruments.

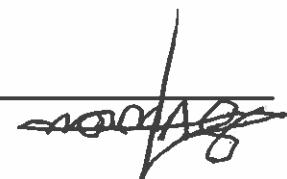
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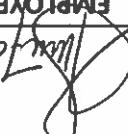
MAYOR



1.

AS WITNESSES:

Thus, done and signed at _____ on this the _____ day of _____ 2021.


2.

07 JUL 2021
EMPLOYEE

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2.

AS WITNESSES:

Thus, done and signed at Kirkwood on this the 7th day of July 2021

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GOOD GOVERNANCE AND PUBLIC PARTICIPATION						
AREA	KEY PERFORMANCE	Weighting	Annual Target	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target
STRATEGIC OBJECTIVE	Key Performance Indicator					
Annual review and development of IDP/Budget	Effective IDP Process for the period under review	3	Final reviewed IDP adopted by 31 May 2022	IDP/Budget Process plan submitted to Council	IDP & Budget submitted to Council by 30th March 2022	Final IDP & budget submitted to Council for approval by the 31 May 2022
	Timely submission of Annual Report	6	Submission of Oversight Report to Council by 30 March 2022	Submission of draft annual report and annual performance report to AG by 31 August 2021	Submission of final annual report and oversight report to Council by 30 March 2022	Publish oversight report
To establish and strengthen service delivery partnerships between the municipality, district, sector departments, communities and civil society	Number of public participation reports submitted to Council	3	4 reports submitted to Council with	1 Report with recommendations	1 Report with recommendations	1 Report with recommendations
	Effectiveness of IGR/Rapid Response Team Structural meetings	3	4 virtual/contact meetings and implementation of resolutions per year	1 meeting held and resolutions implemented	1 meeting held and resolutions implemented	1 meeting held and resolutions implemented
	% of official complaints responded to through the municipal complaints management system	3	100%	100%	100%	100%
	Improve Council oversight	3	% reduction in audit repeat findings	20%	45%	55%
	Existence of fraud prevention mechanism	3	Fraud prevention strategy reviewed and presented to Council	Planning	Development of fraud prevention strategy	Consultations on draft reviewed strategy

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	Functionality of audit committee	3	4 Audit committee meetings per year	1 Audit committee meeting held	4 = Draft submitted before 30/03 5 = draft submitted before 30/12										
	Functionality of Municipal Public Accounts Committee	3	4 meetings per year	1 committee meeting held	1 = 1 meeting 2 = 2-3 meetings 3 = 4 meetings 4 = 5 meetings 5 = More than 6 meetings										
Evaluation of the Performance of Senior managers	Due date compliance for performance reviews conducted during the year	3	4 reviews conducted during the year	4 reviews conducted by 15 August 2021	4 reviews conducted by 15 October 2021	4 Reviews conducted by 15 February 2022	4 Reviews conducted by 15 February 2022	4 Reviews conducted by 15 April 2022	4 Reviews conducted by 15 April 2022	4 Reviews conducted by 15 April 2022	4 Reviews conducted by 15 April 2022	4 Reviews conducted by 15 April 2022	4 Reviews conducted by 15 April 2022	1 = More than a week late 2 = Up to 1 week late 3 = On due date 4 = Up to 1 week prior to due date 5 = More than 1 week prior to due date	
	% average organizational performance rating	3	90% average organizational rating	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	1 = Less than 80% 2 = 80 to 89% 3 = 90% 4 = up to 96% 5 = 97% and above	
To produce financial reports that meet the requirements of National Treasury Department	Due date compliance with the submission of the mid-year report	3		Mid-year report submitted to Council before 31 January 2022	Mid-year report submitted to Council before 31 January 2022	N/A	1 = Up to 14 days late 2 = 1 to 13 days late 3 = On due date 4 = Up to 1 week prior to due date 5 = More than 1 week prior to due date								
KEY PERFORMANCE AREA															
FINANCIAL VIABILITY AND MANAGEMENT															
STRATEGIC OBJECTIVE	Key Performance Indicator	Weighting	Annual Target	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Performance Standards							
Cash flow management	% of MIG grant appropriately spent	6	95% of MIG grant appropriately spent	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	95% of MIG grant appropriately spent as per quarterly expenditure target	1 = less than 80% 2 = 81 to 94 3 = 95% 4 = up to 96% 5 = 97% and above	

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KEY PERFORMANCE AREA		INSTITUTIONAL MANAGEMENT AND ORGANIZATIONAL DEVELOPMENT						
STRATEGIC OBJECTIVE	Key Performance Indicator	Weighting	Annual Target	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Performance Standards
To ensure the municipality approves the organogram and fills vacancies to support the implementation of IDP	Number of financial years targeted to review the organizational structure	3	2 financial years targeted to review Organizational Structure	Organization's structure reviewed and approved by Council for 2021/22 before 31 August 2021	N/A	N/A	N/A	1 = More than a week late 2 = Up to 1 week late 3 = On due date 4 = Up to 1 week prior to due date 5 = More than 1 week prior to due date
Capacity building and empowerment programmes to ensure skills enhancement of staff	% secured for skills development	3	1% of budget secured/ringfenced for skills development	1%	1%	1%	1%	1 = not ring-fenced 2 = less than 1% 3 = 1% secured 4 = Over 1-1,5% 5 = More than 1,5%
To oversee and monitor Audit Action plan	% of external audit actions completed as per Audit Action Plan	6	90 % of external audit completed as per quarterly targets of the audit action plan	90 % of external audit completed as per quarterly targets of the audit action plan	90 % of external audit completed as per quarterly targets of the audit action plan	90 % of external audit completed as per quarterly targets of the audit action plan	90 % of external audit completed as per quarterly targets of the audit action plan	1 = 0-50% completed 2 = 51-80% 3 = 81-90% 4 = 91-94% 5 = 95-100%
To ensure a fully functional Performance Management System	Number of signed performance agreements by the MM and directors	3	Legally required sum of the number of signed performance agreements	Legally required sum of the number of signed performance agreements	Legally required sum of the number of signed performance agreements	Legally required sum of the number of signed performance agreements	Legally required sum of the number of signed performance agreements	1 = 2 Less than required sum 2 = 1 less than required sum 3 = All legally required sum 4 = All submitted to Council and CoGTA before due dates 5 = All loaded on website
KEY PERFORMANCE INDICATOR		LOCAL ECONOMIC DEVELOPMENT						

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Sundays River Valley Municipality

Capacity building for LED	Number of new and filled LED positions as approved in the structure	3	At least one position filled	N/A	1 position filled	N/A	
	Functionality of SMME Forum	3	SMME forum established, launched and 1 meeting held	Terms of Reference developed and submitted to Council	Oversee and monitor the forum	1 forum meeting held	
To create a platform for networking required for effective decision making	No of work opportunities created through public employment programmes	3	100 work opportunities	N/A	N/A	100	
Job creation and livelihood improvement							
KEY PERFORMANCE AREA							
SRVM has good quality roads built according to applicable standards	KM of new municipal road lanes built	3				5 KM	
Ensure access and a continuous supply of good quality water and sanitation to each user by 2030	Frequency of sewer blockages per 50KM of pipeline	3	Less than 5 blockages reported/logged				
	Frequency of unplanned water service interruption	3	Less than 2 per quarter per 500 service connections (at the source)	Less than 2 per quarter per 500 service connections (at the source)	Less than 2 per quarter per 500 service connections (at the source)	Less than 2 per quarter per 500 service connections (at the source)	
	% of non-revenue water	3	50%	N/A	N/A	50%	
Upgrade electricity network for future development	% total electricity losses both technical and non-technical components	3	40%	N/A	N/A	40%	

1 = Not put in organogram
 2 = In organogram but not funded
 3 = 1 filled
 4 = 2 filled

1 = Still old SMME forum
 2 = New forum not established
 3 = New forum in existence
 4 = New Forum launched
 5 = New forum and 1 meeting held

1= less than 30
 2= less than 100
 3= btw 100 & 110
 4= btw 111 & 150
 5= Above 150

1= 1-3KM
 2=less than 5KM
 3= 5KM
 4=6KM
 5= 7 & above

1= 5-9 blockages
 2= 10 & above
 3= 4-5
 4= 1-2
 5= Nil

1 = 11 & above
 2= 2-10 above
 3= less than 2
 4= Nil

1= 80-90
 2= 51-79
 3= 41-50
 4= 31-40
 5= 1-30

1= 80-90
 2= 51-79
 3= 35-40
 4= 11-34
 5=10%

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ANNEXURE B: PERSONAL DEVELOPMENT PLAN

NAME Nombulelo B. POSITION Major DATE -- MANAGER Fadi

Skills/ Behavior to improve <i>List the skills, behaviors, duties or actions that need to improve? Be specific.</i>	Action to be taken <i>What steps or actions need to be taken to improvement?</i>	Development opportunities/Resources <i>What training/resources or support are needed to improve?</i>	Date to be completed	Success measure <i>What does improvement look like</i>

Next review date 20/10/21 Employee Signature Fadi

Manager Signature FADI S.S. 07.11.2021

MINIMUM COMPETENCY LEVELS FOR SENIOR MANAGERS

Description	(a) All municipalities with annual budgets of a value below R500 million; (b) All municipal entities of a parent municipality with an annual budget of a value below R500 million	(a) All municipalities with annual budgets of a value equal to or above and R500 million; and (b) All municipal entities of a parent municipality with an annual budget of a value equal to or above R500 million
Higher Education Qualification	At least NQF Level 6 in a field relevant to the senior management position or Certificate in Municipal Financial Management (SAQA Qualification ID 48965)	At least NQF Level 7 in a field relevant to the senior management position or Minimum of 7 years at senior and middle management level, of which at least 2 years must be at senior management level
Work-Related Experience	Minimum of 5 years at middle management level	Minimum of 7 years at senior and middle management level, of which at least 2 years must be at senior management level
Core Managerial and Occupational Competencies	As described in the performance regulations	As described in the performance regulations
Financial and Supply Chain Management Competency Areas	Required Minimum Competency Level in Unit Standards	Required Minimum Competency Level in Unit Standards
Strategic leadership and management	116358; 116361	116358; 116361
Operational financial management	119341; 119331; 116364	119341; 119331; 116364

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Description	(a) All municipalities with annual budgets of a value below R500 million; (b) All municipal entities of a parent municipality with an annual budget of a value below R500 million	(a) All municipalities with annual budgets of a value equal to or above and R500 million; and (b) All municipal entities of a parent municipality with an annual budget of a value equal to or above R500 million
Governance, ethics and values in financial management	116343	116343
Financial and performance reporting	116363; 119350; 119348; 116341	116363; 119350; 119348; 116341
Risk and change management	116339	116339
Project management	119343	119343
Legislation, policy and implementation	119334; 116361	119334; 116361
Supply Chain Management	116353	116353
Audit and assurance	116351	116351

Further Description of Competencies required

Strategic leadership and Management

- Within the area of responsibility, the ability to contribute to service delivery systems of a complex nature and to manage the achievement of strategies and goals.
- Within the area of responsibility, the ability to formulate and influence short, medium and long-term service delivery plans to deliver on strategies and goals.
- The ability to provide supportive leadership to the accounting officer and senior management team
- Within the area of responsibility, the ability to develop and maintain strategic alliances with various stakeholders.

Strategic Financial Management

- Within the area of responsibility, the ability to support an effective, economic and efficient finance function.
- The ability to forecast revenue and expenditure, and assessing the impact thereof on the financial position and performance, within the area of responsibility.

Operational Financial Management

- Within the area of responsibility, the ability to implement financial systems.
- The ability to understand the importance of maintaining sufficient working capital (cash flow/short term liquidity) to meet the requirements of the area of responsibility.
- The ability to contribute to the budget preparation and implementation process.

Governance, ethics and values in financial management

- The ability to support and implement good governance in the area of responsibility.

Financial and Performance Reporting

- The ability to support the implementation of the financial reporting process of the municipality.
- The ability to support the implementation of the performance reporting process of the municipality.

Risk and Change Management

- The ability to understand risk, and guide the management of risk for the municipality within the area of responsibility.

- The ability to guide the management of change for the municipality within the area of responsibility.

Project Management

- The ability to provide direction and guide project management within the area of responsibility

Legislation, Policy and Implementation

- The ability to support and contribute to the formulation of policy and in the case of a municipality also By-laws
- The ability to implement, manage and oversee the implementation of legislation and policy within the area of responsibility

Stakeholder Relations

- Within the area of responsibility, the ability to guide, establish and maintain appropriate stakeholder relations.

Supply Chain Management

- The ability to contribute to the supply chain management processes

Audit and Assurance

- The ability to support the audit process, in order to obtain the optimum level of assurance from the Auditor-General

07 JUL 2021

