

UGU District Municipality



**UGU DISTRICT MUNICIPALITY**  
**PERFORMANCE AGREEMENT**

Entered into by and between:

**UGU DISTRICT MUNICIPALITY**

**AS REPRESENTED BY THE ACTING MUNICIPAL MANAGER**

**MR VO MAZIBUKO**

**AND**

**THE EMPLOYEE OF THE MUNICIPALITY**

**MR KUSHI AUDAN**

**CHIEF FINANCIAL OFFICER**

**FOR THE**

**FINANCIAL YEAR: 01 JULY 2024 - 30 JUNE 2025**

UD- K.A  
S.P. for C.M. ZN

## PERFORMANCE AGREEMENT

### ENTERED INTO BY AND BETWEEN

**UGU District Municipality** herein represented by **Mr VO Mazibuko** in his capacity as **Acting Municipal Manager** (hereinafter referred to as the Employer)

**And Mr K Audan**

**Chief Financial Officer** of the UGU District Municipality (hereinafter referred to as the Employee).

### WHEREBY IT IS AGREED AS FOLLOWS:

#### 1. INTRODUCTION

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

#### 2. PURPOSE OF THIS AGREEMENT

- 2.1 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;
- 2.2 Specify objectives and targets established for the Employee and to communicate to the Employee the Employer's expectations of the Employee's performance expectations and accountabilities;
- 2.3 Specify accountabilities as set out in the Performance Plan (Annexure A);
- 2.4 Monitor and measure performance against set targeted outputs;
- 2.5 Use the Performance Agreement and Performance Plan as the basis for assessing the suitability of the Employee for permanent employment and/or to assess whether the Employee has met the performance expectations applicable to his/her job;

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## UGU District Municipality

- 2.6 Appropriately reward the Employee in accordance with the Employer's performance management policy in the event of outstanding performance; 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. DELIVERY

- 3.1 This Agreement will commence on the 01 July 2024 and will remain in force until 30 June 2025 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 beginning of each successive financial year.
- 3.3 This Agreement will terminate on the termination of the Employee's contract of employment for any reason.
- 3.4 The content of this Agreement may be revised at any time during the abovementioned period to determine the applicability of the matters agreed upon.
- 3.5 If at any time during the validity of this Agreement the work environment alters (whether as a result of government or council decisions or otherwise) to the extent that the contents of this Agreement are no longer appropriate, the contents shall immediately be revised.

### 4. PERFORMANCE OBJECTIVES

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

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## UGU District Municipality

- 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.
- 4.4 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.

### 5. PERFORMANCE MANAGEMENT SYSTEM

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

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## UGU District Municipality

and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee:

No	Key Performance Area	Weight
1	Municipal Financial Viability and Management	85
2	Municipal Institutional Development and Transformation	5
3	Local Economic Development	-
4	Basic service delivery	-
5	Good Governance and Public Participation	10
6	Cross-cutting Interventions	-
<b>Total</b>		<b>100%</b>

- 5.7 The CFSs will make up the other 20% of the Employee's assessment score. CFSs 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	Competency Framework Structure	Weight
<b>Leadership and core Competencies</b>		
1	Strategic Direction and leadership	10
2	People management	5
3	Programme and Project Management	10
4	Financial Management	15
5	Change Leadership	5
6	Government leadership	10
7	Moral competence	5
8	Planning and organising	10
9	Analysis And innovation	5
10	Knowledge and information management	5
11	Communication	10
12	Results and quality focus	10
<b>Total (Cannot exceed 100%)</b>		<b>100%</b>

## 6. PERFORMANCE ASSESSMENTS

- 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.

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## UGU District Municipality

- 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 The annual performance appraisal will involve:
  - 6.5.1 Assessment of the achievement of results as outlined in the performance plan:
    - 6.5.1.1 Each KPA should be assessed according to the extent to which the specified standards or performance indicators have been met and with due regard to ad hoc tasks that had to be performed under the KPA.
    - 6.5.1.2 An indicative rating on the five-point scale should be provided for each KPA.
    - 6.5.1.3 The applicable assessment rating calculator (refer to paragraph 7.5.3 below) must then be used to add the scores and calculate a final KPA score.
  - 6.5.2 Assessment of the CFSs
    - 6.5.2.1 Each CFS should be assessed according to the extent to which the specified standards have been met.
    - 6.5.2.2 An indicative rating on the five-point scale should be provided for each CFS.
    - 6.5.2.3 The applicable assessment rating calculator (refer to paragraph 7.5.1) must then be used to add the score and calculate a final CFS score.
  - 6.5.3 Overall rating

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

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## UGU District Municipality

- 6.6 The assessment of the performance of the Employee will be based on the following rating scale for KPA s and CFSs:

Level	Terminology	Description	Rating				
			1	2	3	4	5
5	Superior	Has a comprehensive understanding of local government operations, critical in shaping strategic direction and change, develops and applies comprehensive concepts and methods					
4	Advanced	Develops and applies complex concepts, methods and understanding. Effectively directs and leads a group and executes in-depth analyses					
3	Competent	Develops and applies more progressive concepts, methods and understanding. Plans and guides the work of others and executes progressive analyses					
2	Basic	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention					
1	Basic	Applies basic concepts, methods, and understanding of local government operations, but requires supervision and development intervention					

- 6.7 For purposes of evaluating the performance of the Employee, an evaluation panel constituted of the following persons will be established –

- 6.7.1 Municipal Manager
- 6.7.2 Chairperson of the Audit Committee in the absence of a performance audit committee;
- 6.7.3 Member of the Executive committee or in respect of a plenary type municipality, another member of council; and
- 6.7.4 Municipal manager from another Municipality.

## 7. SCHEDULE FOR PERFORMANCE REVIEWS

- 7.1 The performance of each Employee in relation to his/her performance agreement shall be reviewed on the following dates with the

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## UGU District Municipality

understanding reviews in the first and third quarter may be verbal if performance is satisfactory:

First quarter	:	<b>July – September 2024</b>
Second quarter	:	<b>October-December 2024</b>
Third quarter	:	<b>January-March 2025</b>
Fourth quarter	:	<b>April-June 2025</b>

- 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 (Performance Plan) 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 (Performance Plan) whenever the performance management system is adopted, implemented and/or amended. In that case, the Employee will be fully consulted before any such change is made.

## 8. DEVELOPMENTAL REQUIREMENTS

The Pro Forma 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;
  - 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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## UGU District Municipality

- 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.

### 10. CONSULTATION

- 10.1 The Employer agrees to consult the Employee timeously where the exercising of the powers will have amongst others-
- 10.1.1 A direct effect on the performance of any of the Employee's functions;
- 10.1.2 Commit the Employee to implement or to give effect to a decision made by the Employer; and
- 10.1.3 A substantial financial effect on the Employer.
- 10.2 The Employer agrees to inform the Employee of the outcome of any decisions taken pursuant to the exercise of powers contemplated in clause 11.1 as soon as is practicable to enable the Employee to take any necessary action with delay.

### 11. MANAGEMENT OF EVALUATION OUTCOMES

- 11.1 The evaluation of the Employee's performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.
- 11.2 A performance bonus may be paid to the Employee in recognition of outstanding performance. Such bonus will be determined in terms of this agreement.
- 11.3 In the case of unacceptable performance, the Employer shall –
- 11.3.1 Provide systematic remedial or developmental support to assist the Employee to improve his or her performance; and
- 11.3.2 After appropriate performance counselling and having provided the necessary guidance and/or support as well as reasonable time for improvement in performance, the Employer may consider steps to terminate the contract of employment of the Employee on grounds of unfitness or incapacity to carry out his or her duties.

#### ***Performance Bonus criteria***

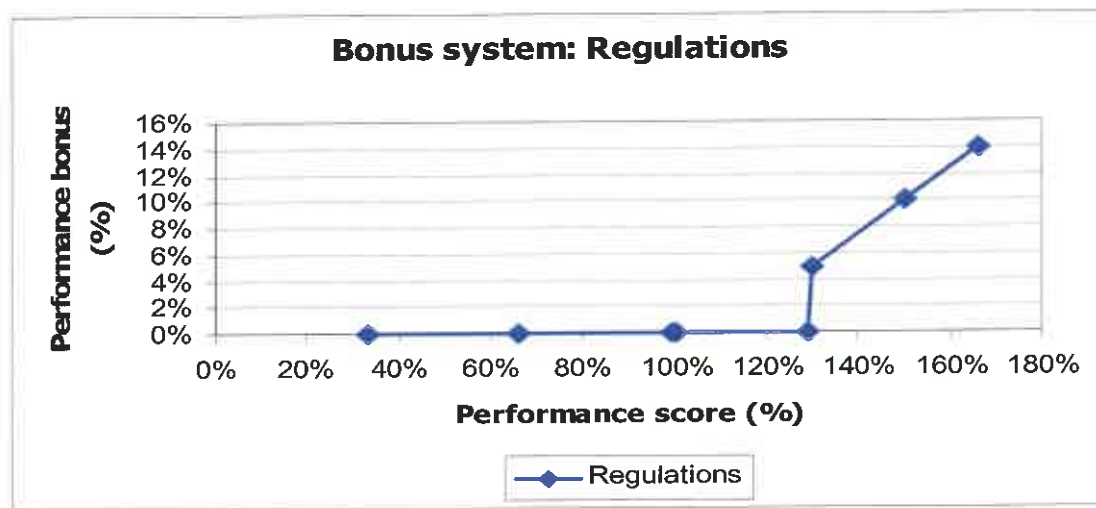
The regulations provide that a performance bonus between 5% and 14% of the inclusive annual remuneration package may be paid to the employee after the end of the financial year and only after an evaluation of performance and approval of such evaluation by the Municipal Council, as a reward for excellent performance. In determining the bonus

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## UGU District Municipality

payment, the regulations specify that the relevant percentage depends on the overall rating, calculated by using the applicable assessment rating calculator:

1. A score of 130% - 149% is awarded a performance bonus ranging between 5%-9%.
2. A score of 150% and above is awarded a performance bonus ranging 10% - 14%.



## 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 –

In the case of municipal manger, the MEC for local government in the province within (30) days of receipt of a formal dispute from the employee, or any other person designated by the MEC; and

Whose decision shall be final and binding to both parties.

- 12.2 Any dispute about the employees performance evaluation, must be mediated by-

In the case of the municipal manager, the MEC for local government in the province within thirty (30) days of receipt of a formal dispute from the employee, or any other person designated by the MEC; and

Whose decision shall be final and binding to both parties

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21

UGU District Municipality

**13. GENERAL**

13.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A (Performance Plan) 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.

Thus done and signed at UGU DM OFFICE on this the 1<sup>ST</sup> day of JULY of 2024

**AS WITNESSES:**

1.  \_\_\_\_\_

2.  \_\_\_\_\_

  
EMPLOYEE

Thus done and signed at P.O. + 81 eps on this the 1 day of July 2024

**AS WITNESSES:**

1.  \_\_\_\_\_

2.  \_\_\_\_\_

  
ACTING MUNICIPAL MANAGER



**PERFORMANCE PLAN**

Entered into by and between

**UGU DISTRICT MUNICIPALITY**

**AS REPRESENTED BY THE ACTING MUNICIPAL MANAGER**

**MR VO MAZIBUKO**

**AND**

**MR KUSHI AUDAN**

**CHIEF FINANCIAL OFFICER**

**THE EMPLOYEE OF THE MUNICIPALITY**

**PERIOD: 01 JULY 2024 – 30 JUNE 2025**

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## **1. PURPOSE**

The performance plan defines the Council's expectations of the **Chief Financial Officer's** performance agreement to which this document is attached and Section 57 (5) of the Municipal Systems Act, which provides that performance objectives and targets must be based on the key performance indicators as set in the Municipality's Integrated Development Plan (IDP) and as reviewed annually.

## **2. KEY RESPONSIBILITIES**

The following objectives of local government will inform the **Chief Financial Officer's** performance against set performance indicators:

- 2.1 Basic Service Delivery
- 2.2 Municipal Institutional Development and Transformation
- 2.3 Local Economic Development
- 2.4 Municipal Financial Viability and Management
- 2.5 Good Governance and Public Participation
- 2.6 Cross-cutting Intervention

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### 3. KEY PERFORMANCE AREAS AND COMPETENCY FRAMEWORK STRUCTURE

The following Key Performance Areas (KPA's) and Competency framework Structure as set in consultation with the employee, inform the strategic objectives listed in the table below:

No	Key Performance Area	Weighting	Competency Framework Structure	Weighting
1	Municipal Financial Viability and Management	85	Strategic Direction and leadership	10
2	Municipal Institutional Development and Transformation	5	People management	5
3	Local Economic Development	-	Programme and Project Management	10
4	Basic service delivery		Financial Management	15
5	Good Governance and Public Participation	10	Change Leadership	5
6	Cross-cutting Interventions	-	Government leadership	10
			Moral competence	5
			Planning and organising	10
			Analysis And innovation	5
			Knowledge and information management	5
			Communication	10
			Results and quality focus	10
		100%		100%

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#### **4. KEY PERFORMANCE INDICATORS**

The following Key Performance Indicators (KPIs) provide the details of the evidence that must be provided to show that a key objective has been obtained. 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.

***Please refer to the attached Key Performance Indicators on the spreadsheet***



Signed and accepted by the Employee



Date: 01/07/2024

Signed by the Acting Municipal Manager on behalf of the Municipality



Date: 01/07/2024



UGU DISTRICT MUNICIPALITY									
2024/2025 SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN									
SDGIP Ref.	STRATEGIC OBJECTIVE	IDP Ref.	PROJECT NAME	KEY PERFORMANCE INDICATOR	Annual Target	Quarterly Projected Target			
						Q1	Q2	Q3	FOE

SDG 16: Build Effective, Accountable and Inclusive Institutions At All Levels

NDP: Building Capable and Developmental State

MTSF: Outcome 5: A skilled and Capable Workforce to Support an Inclusive Growth Path; Outcome 9: A responsive, Accountable, responsive and efficient local government system

Back to Basics: Building capable local government institutions

PGDS: Human Resource Development

DGDS: Institutional development

KPA: Municipal Transformation and Institutional Development

COLOUR CODE			BLUE - WATER SERVICES			ORANGE - CORPORATE SERVICES			GREEN - ECONOMIC DEVELOPMENT & ENVIRONMENTAL SERVICES		
MTD 13- BTO	Attract, skill, retain and reward a talented and diverse workforce to enable departments to efficiently meet their objectives	SO 3.2.1	Compliance with leave management	Percentage Dept Compliance with leave management	100%	100%	Report on Leave Compliance analysis to MANCO/Ext MANCO Minutes	100%	Report on Leave Compliance analysis to MANCO/Ext MANCO Minutes	100%	Report on Leave Compliance analysis to MANCO/Ext MANCO Minutes
MTD 14-BTO	Attract, skill, retain and reward a talented and diverse workforce to enable departments to efficiently meet their objectives	SO 3.2.1	Departmental Overtime	% Compliance on Departmental Overtime	100%	100%	System Report to Manco/ Extended MANCO	100%	System Report to Manco/ Extended MANCO	100%	System Report with Analysis Signed by Management/OD
MTD 17-BTO	Attract, skill, retain and reward a talented and diverse workforce to enable departments to efficiently meet their objectives	SO 3.2.1	IPMS Workplans developed	Cumulative Number of Level 2/18 with workplans developed in BTO	59	85	Consolidated list of Signed Workplans submitted from IPMS section	104	Consolidated list of Signed Workplans submitted from IPMS section	104	Consolidated list of Signed Workplans submitted from IPMS section
MTD 24- BTO	To provide support services to all organisational departments with strong emphasis on the core business through deploying tools and resources to improve on service delivery	SO 3.4.1	Implementation of full council resolutions	% of Full Council resolutions implemented - BTO	100%	100%	Report to MANCO / Ext MANCO Extract	100%	Report to MANCO / Ext MANCO Signed Extract	100%	Report to MANCO / Ext MANCO Signed Extract
MTD 26- BTO	To provide support services to all organisational departments with strong emphasis on the core business through deploying tools and resources to improve on service delivery	SO 3.4.1	Compliance with Records Management	Number of documents submitted in compliance to Departmental records management -BTO	100	100	Progress Report of file plan usage, EDMS to Manco/Extended MANCO/ Portfolio Extract of Minutes	100	Progress Report of file plan usage, EDMS to Manco/Extended MANCO/ Portfolio Extract of Minutes	100	Progress Report of file plan usage, EDMS to Manco/Extended MANCO/ Portfolio Extract of Minutes

SDG 16: Build Effective, Accountable and Inclusive Institutions At All Levels

NDP: Building Capable and Developmental State

MTSF: Outcome 1, Outcome 2, Outcome 3, Outcome 11, Outcome 12 and Outcome 14

Back to Basics: Good Governance, Putting People First

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UGU DISTRICT MUNICIPALITY										
2024-2025 SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN										
SDBP Ref.	STRATEGIC OBJECTIVE	IDP Ref	PROJECT NAME	KEY PERFORMANCE INDICATOR	Annual Target	Quarterly Projected Target				POE
						Q1	Q2	Q3	Q4	
GGPP 33-BTO	To strengthen good governance	SO 5.2.1	Monitoring of vendor performance	Number of vendor performance reports submitted by BTO to SCM	4	1	1	1	1	Email showing submission of vendor performance to SCM
GGPP 35-BTO	To strengthen good governance	SO 5.2.1	Consequence Management	Number of consequence management reports submitted by BTO to MANCO	4	1	1	1	1	Monthly reports to MANCO
SDG Goal 16: Build Effective, Accountable and Inclusive Institutions at all levels										
NDP: Building capable and developmental state										
MTSF: Outcome 9										
Back to Basics: Sound Financial Management										
PGDS: Spatial Equity, Environmental Sustainability										
DGDS: Institutional Development										
KPA: Municipal Financial Viability and Management										
MFVM 1	To develop and implement effective and efficient budget and financial reporting systems	SO 4.6.1	Preparation of Annual Budget	Date Annual Budget approved	Approved 2025/2026 Annual Budget by 31 May 2025	Approved budget process plan by 31 August 2024	NA	NA	NA	Council resolution
MFVM 2	Approved Mid-Year Budget & Performance Assessment by 25 January and Adjustment budget by 28 February	SO 4.6.2	Preparation of Mid-Year Budget & Performance Assessment and Adjustment Budget	Date Mid-Year performance assessment and adjustment budget approved	Approved 2024/2025 Mid-Year performance assessment by 25 January 2025 and adjustment budget by 28 February 2025	NA	NA	NA	NA	Council resolutions
MFVM 3	To coordinate an advice to the Mayor and Council that the budget allocation is done within the context of government priorities	SO 4.6.3	In-Year Reporting on Budget Implementation	Number of Data Extracts submitted	12 Data Extracts	NA	NA	NA	NA	DATA STRINGS SUBMISSION
										DATA STRINGS SUBMISSION

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2024-2025 SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN										
SDBIP Ref.	STRATEGIC OBJECTIVE	IDP Ref	PROJECT NAME	KEY PERFORMANCE INDICATOR	Annual Target	Quarterly Projected Target				POE
						Q1	Q2	Q3	Q4	
MPVM 6	To ensure sound internal financial controls, risk management and MFMA compliance	SO 4.8.1	Addressing BTO related AG audit queries through formulation of corrective action plan (BTO)	Date: 2023/2024 BTO Corrective action plan submitted to Internal Audit	Submit 2023/2024 BTO Corrective action plan to Internal Audit by 28 February 2025	N/A	N/A	N/A	N/A	POE
MPVM 7	To ensure that cash reserves are improved	SO 4.1.1	Recording all transactions accurately and completely	Number of cash book updates	12 Updated cash books	3	3	3	3	Cash books
MPVM 8	Compliance with all laws and regulations	SO 4.1.2	Recording all transactions accurately and completely	Number of General Ledger updates	12 Updated General Ledger	3	3	3	3	Updated General Ledger
MPVM 9	Compliance with all laws and regulations	SO 4.1.2	Recording all transactions accurately and completely	Number of Bank reconciliations	12 Bank reconciliations	3	3	3	3	Bank reconciliations
MPVM 10	To ensure completeness and accuracy of municipality's creditor related transactions and accounts disclosed	SO 4.5.1	Recording all transactions accurately and completely	Number of Creditors Reconciliations	12 Creditors reconciliations	3	3	3	3	Creditors reconciliations
MPVM 11	To develop and implement effective and efficient revenue management systems(RMS)	SO 4.2.1	Recording all transactions accurately and completely	Number of Debtors Reconciliations	12 Debtors reconciliations	3	3	3	3	Debtors reconciliations

12

UGU DISTRICT MUNICIPALITY

2024-2025 SERVICE DELIVERY AND BUDGET IMPLEMENTATION PLAN

SOBIP Ref.	STRATEGIC OBJECTIVE	IDP Ref	PROJECT NAME	KEY PERFORMANCE INDICATOR	Annual Target	Quarterly Projected Target			
						Q1	Q2	Q3	POE
MFVM 14	To facilitate economic transformation	SO 4.4.2	Implementation of Supply Chain Management Policy	Date of adoption of Reviewed SCM Policy	Adopt Reviewed SCM Policy by 30 June 2025	N/A	N/A	N/A	N/A
MFVM 15	To prevent irregular expenditure	SO 4.4.4	Implementation of Supply Chain Management Policy	Number of quarterly Deviations & UIFW expenditure registers submitted to COGTA	4 Quarterly Deviations & UIFW expenditure registers submitted to COGTA	1	1	1	Quarterly Deviations & UIFW expenditure register & email to COGTA
MFVM 16	To develop and implement annual procurement plan	SO 4.4.3	Development of Annual Procurement Plan	Date of approval of Procurement Plan	Approved Procurement Plan by 30 June 2025	N/A	N/A	N/A	N/A
MFVM 17	Creditors paid within 30 days	SO 4.5.3	100% Compliance with creditors payment plan	Percentage of creditors payment plan compliance	100% Compliance with creditors payment plan	100% Compliance with creditors payment plan	100% Compliance with creditors payment plan	100% Compliance with creditors payment plan	Payment Plan Register
MFVM 18	Creditors paid within 30 days	SO 4.5.3	Payment of monthly salaries on time	Date by which salaries are paid	Payment of monthly salaries by the 20th of each month	20th of each month	20th of each month	20th of each month	Monthly Salary Payment Report
MFVM 19	Creditors paid within 30 days	SO 4.5.3	Payment of monthly third party	Date by which third party payments are made	Payment of monthly third parties by the 7th of each month	7th of each month	7th of each month	7th of each month	Monthly Deductions Payment Report

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## **Annexure B**



### **PERSONAL DEVELOPMENT PLAN (PDP)**

**Entered into by and between**

**THE MUNICIPALITY OF UGU  
AS REPRESENTED BY THE ACTING MUNICIPAL MANAGER**

**MR VO MAZIBUKO**

**[THE EMPLOYER]**

**AND**

**MR KUSHI AUDAN**

**[THE EMPLOYEE]**

**PERIOD: 1 JULY 2024 - 30 JUNE 2025**

## Personal Development Plan

- 1.1.1 UGU District Municipality is committed to –
- (a) the continuous training and development of its employees to achieve its vision, mission and strategic objectives and empower employees; and
  - (b) managing training and development within the ambit of relevant national policies and legislation.
- 1.1.2 The municipality shall follow an integrated approach to Human Resource Management, that is:
- (a) Human resource development forms an integral part of human resource planning and management.
  - (b) In order for training and development strategy and plans to be successful it shall be based on sound Human Resource (HR) practices, such as the (strategic) HR Plan, job descriptions, the result of regular performance appraisals and career pathing.
  - (c) To ensure the necessary linkage with performance management, the Performance Management and Development System provides for the Personal Development Plans of employees to be included in their annual performance agreements. Such approach will also ensure the alignment of individual performance objectives to the municipality's strategic objectives, and that training and development needs can be identified through performance management and appraisal.
  - (d) Career-pathing ensures that employees are placed and developed in jobs according to aptitude and identified potential. Through training and development they can acquire the necessary competencies to prepare them for future positions. A comprehensive competency framework and profile for Municipal Managers are attached and these shall be linked to relevant registered unit standards to specifically assist them in compiling Personal Development Plans in consultation with their managers.
  - (e) Personal Development Plans are compiled for individual employees and the data collated from all employees in the municipality forms the basis for the prescribed Workplace Skills Plan, which municipalities are required to compile as a basis for all training and education activities in the municipality in a specific financial year and report on progress made to the Local Government Sector Education and Training Authority.
- 1.1.3 The aim of the compilation of Personal Development Plans is to identify, prioritise and implement training needs.
- 1.1.4 Compiling the Personal Development Plan attached as Appendix.
- (a) Competency assessment instruments, which are dealt with more specifically in Appendix 1 and 2, shall be established to assist with the objective assessment of employees' actual competencies against their job specific competency profiles and managerial competencies at a given period in time with the purpose of identifying training needs or skills gaps.
  - (b) The competency framework and profiles and relevant competency assessment results will enable a manager, in consultation with his / her employee, to compile a Personal Development Plan. The identified training needs shall be entered into column 1 of Appendix 1, entitled Skills / Performance Gap. The following shall be carefully determined during such a process:
    - (i) Organisational needs, which include the following:
      - o Strategic development priorities and competency requirements, in line with the municipality's strategic objectives.

- The competency requirements of individual jobs. The relevant job requirements (job competency profile) as identified in the job description shall be compared to the current competency profile of the employee to determine the individual's competency gaps.
  - Specific competency gaps as identified during the probation period and performance appraisal of the employee.
- (ii) Individual training needs that are job / career related.
- (c) Next, the prioritisation of the training needs shall be listed since it may not be possible to address all identified training needs in a specific financial year. It is however of critical importance that training needs be addressed on a phased and priority basis. This implies that all these needs shall be prioritized for purposes of accommodating critical / strategic training and development needs in the HR Plan, Personal Development Plans and the Workplace Skills Plan.
- (d) Consideration must then be given to the expected outcomes, to be listed in column 2 of Appendix 1, so that once the intervention is completed the impact it had can be measured against relevant output indicators.
- (d) An appropriate intervention shall be identified to address training needs / skills gaps and the outcome to be achieved but with due regard to cost effectiveness. These shall be listed in column 3 of Appendix 1, entitled: Suggested training and / or development activity in line with the National Qualifications Framework, which could enable the trainee to obtain recognition towards a qualification for training undertaken. It is important to determine through the Training / Human Resource Development / Skills Development Unit within the municipality whether unit standards have been developed and registered with the South African Qualifications Authority that are in line with the skills gap and expected outcomes identified. Unit standards usually have measurable assessment criteria to determine achieved competency.
- (e) Guidelines regarding the number of training days per employee and the nominations of employees: An employee shall on average receive at least five days of training per financial year and not unnecessarily be withdrawn from training interventions.
- (f) Column 4 of Appendix 1: The suggested mode of delivery refers to the chosen methodology that is deemed most relevant to ensure transfer of skills. The training / development activity shall impact on delivery back in the workplace. Mode of delivery consists of, amongst others, self-study [The official takes it upon him / her to read e.g. legislation]; internal or external training provision; coaching and / or mentoring and exchange programmes, etc.
- (g) The suggested time frames (column 5 of Appendix 1) enable managers to effectively plan for the annum e.g. so that not all their employees are away from work within the same period and also ensuring that the PDP is implemented systematically.
- (h) Work opportunity created to practice skill / development areas, in column 6 of Appendix 1, further ensures internalisation of information gained as well as return on investment (not just a nice to have skill but a necessary to have skill that is used in the workplace).
- (i) The final column, column 7 of Appendix 1, provides the employee with a support person that could act as coach or mentor with regard to the area of learning.





# Personal Development Plan of:

MR KUSHI AUDAN

Appendix A

Compiled on (Date): 1 July 2024

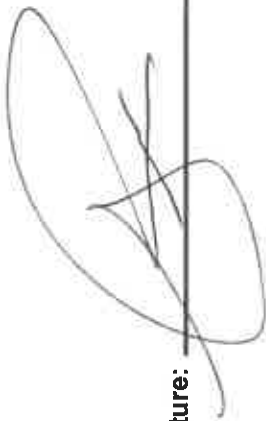
1. Skills / Performance Gap (in order of priority)	2. Outcomes Expected (measurable indicators: quantity, quality and time frames)	3. Suggested training and / or development activity	4. Suggested mode of delivery	5. Suggested Time Frames	6. Work opportunity created to practice skill / development area	7. Support Person
1. Maintaining continuing professional development as a Chartered Accountant (CA).	Knowledge and application of: Financial management principles, Strategic capability & Leadership, Performance management & Reporting, Interpretation & implementation within the legislation and national policy, People management & empowerment, Client orientation & customer focus.	Membership with SAICA renewed by ensuring that the municipality pays for my annual membership fees to SAICA.  By attendance of training courses, seminars workshops, conferences for continuous learning and application of skills.	Payment of annual membership fees to SAICA.  External Service Provider - attendance of lectures, training courses, workshops, seminars and conferences	1 July 2024 to 30 June 2027	Keeping up to date with financial standards and the application thereof within the municipality.	Municipal Manager and the GM: Corporate Services.

K.A



2.Executive Leadership	To sharpen and broaden the scope of managing the municipality as a business model.	Master's in commerce (MCom)	Approved tertiary institution - attendance of lectures.	1 July 2024 to 30 June 2027	Management of the finance and operations within the municipality.	Municipal Manager and the GM: Corporate Services.
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HOD's signature: \_\_\_\_\_



Acting Municipal Manager \_\_\_\_\_



01.07.24