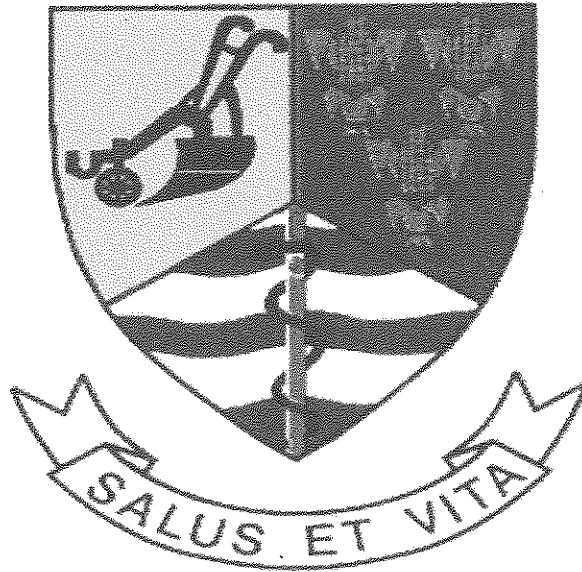


# BELA-BELA LOCAL MUNICIPALITY



**2022/2023**

**PERFORMANCE AGREEMENT**

**FOR**

**RM MARUTHA**

**CHIEF FINANCIAL OFFICER**

VW SS

R.m

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**PERFORMANCE AGREEMENT**

**MADE AND ENTERED INTO BY AND BETWEEN:**

**THE BELA-BELA LOCAL MUNICIPALITY**

**AS REPRESENTED BY THE ACTING MUNICIPAL MANAGER**

**JB SELAPYANE**

(Herein and after referred to as the Employer)

**AND**

**RM MARUTHA**

(Herein and after referred to as the Employee)

**FOR THE PERIOD**

**01 JULY 2022 TO 30 JUNE 2023 FINANCIAL YEAR**

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## 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 No. 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;
- 1.5 In this Agreement, the following terms will have the meaning ascribed thereto:
  - 1.5.1 “**Core competencies**”- means competencies that cut across all levels of work in a municipality and enhance contextualized leadership that guarantees service delivery impact;
  - 1.5.2 “**Leading competencies**”- means competencies that are required to develop clear institutional strategy, initiate, drive and implement programs to achieve long-term sustainable and measurable service delivery performance results;
  - 1.5.3 “**this Agreement**”- means the performance Agreement between the Employer and the Employee and the Annexures thereto;
  - 1.5.4 “**the Mayor**”- means the Mayor of council appointed in terms of the Local Government: Municipal Structures Act No. 117 of 1998;
  - 1.5.5 “**the Employee**”- means the **Chief Financial Officer** appointed in terms of Section 56 (1) (a) (i) of the Local Government Municipal Systems Act No 32 of 2000
  - 1.5.6 “**the Employer**”- means Bela-Bela Municipal Council ; and
  - 1.5.7 “**the Parties**” means the Employer and the Employee.

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### 1.5.8 Regulations

- 1.5.8.1 Local Government: Municipal Planning and Performance Management regulations, 2001
- 1.5.8.2 Local Government: Municipal Performance Regulations for Municipal Managers and Managers directly Accountable to Municipal Managers, 2006
- 1.5.8.3 Local Government: Regulations on appointment and conditions of employment of senior managers. (17 January 2014)
- 1.5.8.4 Local Government: Municipal Regulations on minimum Competency Levels, 2007, issued in terms of the Municipal Finance Management Act, No. 56 of 2003, as published under Government Notice No. 493 in Government Gazette No. 29967 of 15 June 2007
- 1.5.9 “**Municipal Manager**” – means a Municipal Manager or Acting Municipal Manager, appointed in terms of section 54A of the Local Government: Municipal Systems Act No. 32 of 2003.
- 1.5.10 “**Senior Manager**” – means a Manager directly accountable to Municipal Manager, appointed in terms of section 56 of the Local Government: Municipal Systems Act No. 32 of 2003.
- 1.5.11 “**Evaluation Panel**”- means the committee constituted for the purpose of evaluating performance of the Municipal Manager and Managers directly accountable to the Municipal Manager.

## 2. PURPOSE OF THE PERFORMANCE AGREEMENT

2.1 The purpose of this Agreement is to:

- 2.1.1 Comply with the provisions of Section 57(1) (b), (4A), (4B) and (5) of the Act as well as the employment contract entered into between the parties;
- 2.1.2 Specify objectives in terms of the key performance indicators and targets defined and agreed with the employee and to communicate to the employee the employer’s expectations of the employee’s performance and accountabilities in alignment with the Integrated Development Plan (IDP), Service Delivery and Budget implementation Plan (SDBIP) and the Budget of the municipality;
- 2.1.3 Give effect to the employer’s commitment to a performance-orientated relationship with its employee in attaining equitable and improved service delivery.
- 2.1.4 Specify accountabilities as set out in a Performance Plan, which forms an Annexure to the Performance Agreement;
- 2.1.5 Monitor and measure performance against set targeted outputs;

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- 2.1.6 Use the Performance Agreement as the basis for assessing whether the employee has met the performance expectations applicable to his or her job;
- 2.1.7 Reward the **Employee** appropriately, in the event of outstanding performance;
- 2.1.8 Give effect to the employer's commitment to a performance-orientated relationship with its employee in attaining equitable and improved service delivery.

### 3 COMMENCEMENT AND DURATION

3.1 This Agreement will commence on **01 July 2022**, irrespective of the date on which it was signed by both **Parties**, and will remain in force until **30 June 2023** thereafter, a new Performance Agreement, Performance Plan and Personal Development Plan shall be concluded between the **Parties** for the next financial year or any portion thereof;

3.2 The **Parties** will conclude a new Performance Agreement that replaces this Agreement at least once a year by not later than 31<sup>st</sup> 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 Parties agree to review the provisions of this agreement during **June** each year

3.5 If at any time during the validity of this Agreement the work environment alters to the extent that the contents of this Agreement are no longer appropriate, the contents must, by mutual agreement between the **Parties**, 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
- 4.1.2 The time frames within which those performance objectives and targets must be met; and
- 4.1.3 The Competencies comprising of the Leading Competencies and the Core Competencies

4.2 The performance objectives, and targets reflected in Performance Plan are set by the **Employer** in consultation with the **Employee** and based on the Approved 2022/2023 Integrated Development Plan, Approved 2022/2023 Service Delivery and Budget Implementation Plan (SDBIP) and the Approved 2022/2023 Budget of the **Employer**, and shall include:

4.2.1 Key objectives: that describes the main tasks that need to be done;

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4.2.2 Key performance indicators: that provides the details of the evidence that must be provided to show that a key objective has been achieved;

4.2.3 Target dates: that describes the time frame in which the targets must be achieved; and

4.2.4 Weightings: showing the relative importance of the key objectives to each other;

4.3 The Personal Development Plan (Annexure B) sets out the **Employee's** personal development requirements in line with the objectives and targets of the **Employer**; and

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.

4.5 Disclosure of Financial Interests (Annexure C) set out the financial interests of the employee

## **5 PERFORMANCE MANAGEMENT SYSTEM**

5.1 The **Employee** agrees to participate in the performance management system that the **Employer** adopts or introduces for the municipality;

5.2 The **Employee** accepts that the purpose of the performance management system will be to provide a comprehensive system with specific performance standards to assist the **Employer**, management and municipal staff to perform to the standards required;

5.3 The **Employer** will consult the **Employee** about the specific performance standards that will be included in the performance management system as applicable to the **Employee**;

5.4 The **Employee** undertakes to actively focus towards the promotion and implementation of the (KPAs), including special projects relevant to the employee's responsibilities, within the local government framework;

5.5 The criteria upon which the performance of the **Employee** shall be assessed shall consist of two components, Operational Performance in the form of key performance indicators (KPIs) under specific Key Performance Areas (KPAs) and Competencies: Leading- and Core Competencies, 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 Competencies: Leading- and Core Competencies respectively.

5.5.2 Each area of assessment will be weighted and will contribute a specific part to the total score.

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5.7 In the case of managers directly accountable to the municipal manager, KPAs related to the functional area of the relevant manager, must be subject to negotiation between the municipal manager and the relevant manager.

Key Performance Areas		Weighting
1	Basic Service and Infrastructure Development	0%
2	Municipal Institutional Development and Transformation	10%
3	Local Economic Development (LED)	0%
4	Municipal Financial Viability and Management	80%
5	Good Governance and Public Participation	10%
6	Spatial Rationale	0%
<b>Total</b>		<b>100%</b>

**The KPA must constitute 100% and be converted to 80%**

5.3 KPAs covering the main areas of work will account for 80% and Competencies: Leading – and Core Competencies 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 key performance indicator outputs / outcomes identified as per attached Performance Plan (Annexure A), which are linked to the KPAs, and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee

6. COMPETENCY FRAMEWORK

6.1 A person appointed as a senior manager must have the competencies as set out in this framework. Focus must also be placed on the following key factors:

- (a) Critical leading competencies that drive the strategic intent and direction of local government;
- (b) Core competencies which senior managers are expected to possess, and which drive the execution of the leading competencies; and
- (c) The eight Batho Pele principles.

6.2 The competency framework consists of **six leading competencies** which comprise of twenty (20) driving competencies that communicate what is expected for effective performance in local government.

6.3 The competency framework further involves **six core competencies** that act as drivers to ensure that the leading competencies are executed at an optimal level.

6.4 Competency Framework Structure

6.4.1 The competencies that appear in the competency framework are detailed below:

CRITICAL LEADING COMPETENCIES	
<b>Six (6) Leading Competencies</b>	Twenty (20) driving competencies
Strategic Direction and Leadership	<ul style="list-style-type: none"> <li>• Impact and Influence</li> <li>• Institutional Performance Management</li> <li>• Strategic Planning and Management</li> <li>• Organisational Awareness</li> </ul>
People Management	<ul style="list-style-type: none"> <li>• Human Capital Planning and Development</li> <li>• Diversity Management</li> <li>• Employee Relations Management</li> <li>• Negotiation and Dispute Management</li> </ul>
Program and Project Management	<ul style="list-style-type: none"> <li>• Program and Project Planning and Implementation</li> <li>• Service Delivery Management</li> <li>• Program and Project Monitoring and Evaluation</li> </ul>
Financial Management	<ul style="list-style-type: none"> <li>• Budget Planning and Execution</li> <li>• Financial Strategy and Delivery</li> <li>• Financial Reporting and Monitoring</li> </ul>
Change Management	<ul style="list-style-type: none"> <li>• Change Vision and Strategy</li> <li>• Process Design and Improvement</li> <li>• Change Impact Monitoring and Evaluation</li> </ul>
Governance Leadership	<ul style="list-style-type: none"> <li>• Policy Formulation</li> </ul>

<sup>1</sup> This competency Framework replaces regulation 26 (8) of the Local Government: Municipal Performance Regulations for Municipal Managers and Managers directly accountable to Municipal Managers, (Government Notice No. 805) as published in Government Gazette No. 29089 of 1 August 2006.

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CRITICAL LEADING COMPETENCIES	
Six (6) Leading Competencies	Twenty (20) driving competencies
	<ul style="list-style-type: none"> <li>• Risk and Compliance Management</li> <li>• Cooperative Governance</li> </ul>
SIX (6) CORE COMPETENCIES	
Moral Competence	
Planning and Organising	
Analysis and Innovation	
Knowledge and Information Management	
Communication	
Results and Quality Focus	

## 7. PERFORMANCE ASSESSMENT

7.1 The Performance Plan (Annexure A) to this Agreement sets out:

7.1.1 The standards and procedures for evaluating the Employee's performance; and

7.1.2 The intervals for the evaluation of the Employee's performance;

7.2 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;

7.3 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;

7.4 The **Employee's** performance will be measured in terms of contributions to the strategic objectives and strategies set out in the **Employer's** IDP.

7.5 The Annual performance appraisal will involve:

7.5.1 Assessment of the achievement of results as outlined in the Performance Plan

(a) Each KPA should be assessed according to the extent to which the specified standards or performance indicators have been met and with due regard to *ad-hoc* tasks that had to be performed under the KPA

(b) Values are supplied for KPI's and Activities under each KPA as part of the Institutional Assessment. Based on the Target for an activity or KPI, over or under performance are calculated and converted to the 1-5 point scale automatically. These scores are carried over to the applicable

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employee's performance plan. During assessment, the employee has a chance to submit evidence of performance where a disagreement

(c) The Employee will submit his self-evaluation to the Employer prior to the formal assessment; and

(d) An overall score will be calculated based on the total of the individual scores calculated above.

#### 7.5.2 Assessment of the Leading Competencies and Core Competencies:

(a) There is no hierarchical connotation to the structure and all competencies are essential to the role of a senior manager to influence high performance.

(b) All competencies must therefore be considered as measurable and critical in assessing the level of a senior manager's performance.

(c) The competency framework is underscored by four (4) achievement levels that act as benchmark and minimum requirements for other human capital interventions, which are, recruitment and selection, learning and development, succession and planning, and promotion.

#### 7.5.3 Achievement Levels

7.5.3.1 The achievement levels indicated in the table below serves as a benchmark for the appointments, succession planning and development interventions.

7.5.3.2 Individuals falling within the Basic range are deemed unsuitable for the role of senior manager, and caution should be applied in promoting and appointing such persons.

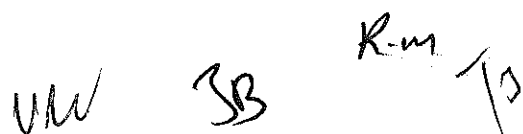
7.5.3.3 Individuals that operate in the Superior range are deemed highly competent and demonstrate an exceptional level of practical knowledge, attitude and quality. These individuals should be considered for higher positions, and should be earmarked for leadership programs and succession planning.

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

7.5.4 COMPETENCY DESCRIPTION: LEADING COMPETENCIES

Cluster	Leading Competencies			Weight
Competency Name	Strategic Direction and Leadership <sup>1</sup>			10
Competency Definition	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate.			
ACHIEVEMENT LEVELS				
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> <li>Understand the institutional and departmental strategic objectives, but lacks ability to inspire others to achieve set mandate</li> <li>Describe how specific tasks link to the institutional strategies but has limited influence in directing strategy</li> <li>Has a basic understanding of institutional performance management, but lacks the ability to integrate systems into a collective whole</li> <li>Demonstrate a basic understanding of key decision makers</li> </ul>	<ul style="list-style-type: none"> <li>Give direction to a team in realising the institution's strategic mandate and set objectives</li> <li>Has a positive impact and influence on the morale, engagement and participation of team members</li> <li>Develop actions plans to execute and guide strategy implementation</li> <li>Assist in defining performance measures to monitor the progress and effectiveness of the institution</li> <li>Displays and awareness of institutional structures and political factors</li> <li>Effectively communicate barriers to execution to</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate all activities to determine value and alignment to strategic intent</li> <li>Display in-depth knowledge and understanding of strategic planning</li> <li>Align strategy and goals across all functional areas</li> <li>Actively define performance measures to monitor the progress and effectiveness of the institution</li> <li>Consistently challenge strategic plans to ensure relevance</li> <li>Understand institutional structures and political factors, and the consequences of actions</li> <li>Empower others to follow strategic direction and deal with complex situations</li> </ul>	<ul style="list-style-type: none"> <li>Structure and position the institution to local government priorities</li> <li>Actively use in-depth knowledge and understanding to develop and implement a comprehensive institutional framework</li> <li>Hold self-accountable for strategy execution and results</li> <li>Provide impact and influence through building and maintaining strategic relationships</li> <li>Create an environment that facilitates loyalty an innovation display a superior level of self-discipline and integrity in actions</li> <li>Integrate various systems into a collective whole to optimise institutional performance management</li> <li>Uses understanding of competing interests to manoeuvre successfully to a win/win outcome</li> </ul>	



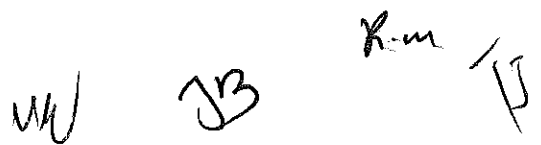
<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Strategic Direction and Leadership <sup>1</sup>			<b>10</b>
<b>Competency Definition</b>	Provide and direct a vision for the institution, and inspire and deploy others to deliver on the strategic institutional mandate.			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
	<ul style="list-style-type: none"> <li>relevant parties</li> <li>• Provide guidance to all stakeholders in the achievement of the strategic mandate</li> <li>• Understand the aim and objectives of the institution and relate it to own work</li> </ul>	<ul style="list-style-type: none"> <li>• Guide the institution through complex and ambiguous concern</li> <li>• Use understanding of power relationships and dynamic tensions among key players to frame communications and develop strategies, positions and alliances</li> </ul>		

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Cluster	Leading Competencies			Weight
Competency Name	People Management <sup>2</sup>			10
Competency Definition	Effectively manage, inspire and encourage people, respect diversity, optimise talent and build nature relationships in order to achieve institutional objectives			
ACHIEVEMENT LEVELS				
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> <li>Participate in team goal setting and problem solving</li> <li>Interact and collaborate with people of diverse backgrounds</li> <li>Aware of guidelines for employee development, but requires support in implementing development initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Seek opportunities to increase team contribution and responsibility</li> <li>Respect and support the diverse nature of others and be aware of the benefits of a diverse approach</li> <li>Effectively delegate tasks and empower others to increase contribution and execute functions optimally</li> <li>Apply relevant employee legislation fairly and consistently</li> <li>Facilitate team goal-setting and problem solving</li> <li>Effectively identify capacity requirements to fulfil the strategic mandate</li> </ul>	<ul style="list-style-type: none"> <li>Identify ineffective team and work processes and recommend remedial interventions</li> <li>Recognise and reward effective and desired behaviour</li> <li>Provide mentoring and guidance to others in order to increase personal effectiveness</li> <li>Identify development and learning needs within the team</li> <li>Build a work environment conducive to sharing, innovation, ethical behaviour and professionalism</li> <li>Inspire a culture of performance excellence by giving positive and constructive feedback to the team</li> <li>Achieve agreement or consensus in adversarial environments</li> <li>Lead and unite diverse teams</li> </ul>	<ul style="list-style-type: none"> <li>Develop and incorporate best practice people management processes, approaches and tools across the institution</li> <li>Foster a culture of discipline, responsibility and accountability</li> <li>Understand the impact of diversity in performance and actively incorporate a diversity strategy in the institution</li> <li>Develop comprehensive integrated strategies and approaches to human capital development and management</li> <li>Actively identify trends and predict capacity requirements to facilitate unified transition and performance management</li> </ul>	

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<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	People Management <sup>2</sup>			<b>10</b>
<b>Competency Definition</b>	Effectively manage, inspire and encourage people, respect diversity, optimise talent and build nature relationships in order to achieve institutional objectives			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
		across divisions to achieve institutional objectives		



<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Program and Project Management <sup>3</sup>			<b>10</b>
<b>Competency Definition</b>	Able to understand program and project management methodology; plan, manage, monitor and evaluate specific activities in order to deliver on set objectives			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>• Initiate projects after approval from higher authorities</li> <li>• Understand procedures of program and project management methodology, implications and stakeholder involvement</li> <li>• Understand the rationale of projects in relation to the institution's strategic objectives</li> <li>• Document and communicate factors and risk associated with own work</li> <li>• Use results and approaches of successful project implementation as guide</li> </ul>	<ul style="list-style-type: none"> <li>• Establish broad stakeholder involvement and communicate the project status and key milestones</li> <li>• Define the roles and responsibilities of the project team and create clarity around expectations</li> <li>• Find a balance between project deadline and the quality of deliverables</li> <li>• Identify appropriate project resources to facilitate the effective completion of the deliverables</li> <li>• Comply with statutory requirements and apply policies in a consistent manner</li> <li>• Monitor progress and use of resources and make needed adjustments to timelines, steps, and resource allocation</li> </ul>	<ul style="list-style-type: none"> <li>• Manage multiple programs and balance priorities and conflicts according to institutional goals</li> <li>• Apply effective risk management strategies through impact assessment and resource requirements</li> <li>• Modify project scope and budget when required without compromising the quality and objectives of the project</li> <li>• Involve top-level authorities and relevant stakeholders in seeking project buy-in</li> <li>• Identify and apply contemporary project management methodology</li> <li>• Influence and motivate project team to deliver exceptional results</li> <li>• Monitor policy implementation and apply procedures to manage risks</li> </ul>	<ul style="list-style-type: none"> <li>• Understand and conceptualise the long-term implications of desired project outcomes</li> <li>• Direct a comprehensive strategic macro and micro analysis and scope projects accordingly to realise institutional objectives</li> <li>• Consider and initiate projects that focus on achievement of the long-term objectives</li> <li>• Influence people in positions of authority to implement outcomes of projects</li> <li>• Lead and direct translation of policy into workable action plans</li> <li>• Ensures that programs are monitored to track progress and optimal resource utilisation, and that adjustments are made as needed</li> </ul>	

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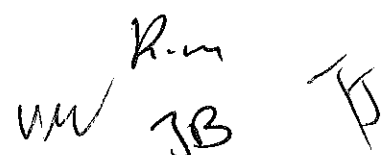
<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Financial Management <sup>4</sup>			<b>20</b>
<b>Competency Definition</b>	Able to compile, and manage budgets, control cash flow, institute financial risk management and administer procurement processes in accordance with recognised financial practices. Further to ensure that all financial transactions are managed in an ethical manner			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>• Understand basic financial concepts and methods as they relate to institutional processes and activities</li> <li>• Display awareness into the various sources of financial data, reporting mechanisms, financial governance, processes and systems</li> <li>• Understand the importance of financial accountability</li> <li>• Understand the importance of asset control</li> </ul>	<ul style="list-style-type: none"> <li>• Exhibit knowledge of general financial concepts, planning, budgeting, and forecasting and how they interrelate</li> <li>• Assess, identify and manage financial risks</li> <li>• Assume a cost saving approach to financial management</li> <li>• Prepare financial reports based on specified formats</li> <li>• Consider and understand the financial implications of decisions and suggestions</li> <li>• Ensure that delegation and instructions as required by National Treasury guidelines are reviewed and updated</li> <li>• Identify and implement</li> </ul>	<ul style="list-style-type: none"> <li>• Take active ownership of planning, budgeting, and forecast processes and provides credible answers to queries within own responsibility</li> <li>• Prepare budgets that are aligned to the strategic objectives of the institution</li> <li>• Address complex budgeting and financial management concerns</li> <li>• Put systems and processes in place to enhance the quality and integrity of financial management practices</li> <li>• Advise on policies and procedures regarding asset control</li> </ul>	<ul style="list-style-type: none"> <li>• Develop planning tools to assist in evaluating and monitoring future expenditure trends</li> <li>• Set budget frameworks for the institution</li> <li>• Set strategic direction for the institution on expenditure and other financial processes</li> <li>• Build and nurture partnerships to improve financial management and achieve financial savings</li> <li>• Actively identify and implement new methods to improve asset control</li> <li>• Display professionalism in dealing with financial data and processes</li> </ul>	

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<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Financial Management <sup>4</sup>			<b>20</b>
<b>Competency Definition</b>	Able to compile, and manage budgets, control cash flow, institute financial risk management and administer procurement processes in accordance with recognised financial practices. Further to ensure that all financial transactions are managed in an ethical manner			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
	proper monitoring and evaluation practices to ensure appropriate spending against budget	<ul style="list-style-type: none"> <li>Promote National Treasury's regulatory framework for Financial Management</li> </ul>		

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<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Change Leadership <sup>5</sup>			<b>10</b>
<b>Competency Definition</b>	Able to direct and initiate institutional transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>• Display an awareness of change interventions, and the benefits of transformation initiatives</li> <li>• Able to identify basic needs for change</li> <li>• Identify gaps between the current and desired state</li> <li>• Identify potential risk and challenges to transformation, including resistance to change factors</li> <li>• Participate in change programs and piloting change interventions</li> <li>• Understand the impact of change interventions on the institution within the broader scope of Local Government</li> </ul>	<ul style="list-style-type: none"> <li>• Perform an analysis of the change, impact on the social, political and economic environment</li> <li>• Maintain calm and focus during change</li> <li>• Able to assist team members during change and keep them focused on the deliverables</li> <li>• Volunteer to lead change efforts outside of own work team</li> <li>• Able to gain buy-in and approval for change from relevant stakeholders</li> <li>• Identify change readiness levels and assist in resolving resistance to change factors</li> <li>• Design change interventions that are aligned with the institution's</li> </ul>	<ul style="list-style-type: none"> <li>• Actively monitor change impact and results and convey progress to relevant stakeholders</li> <li>• Secure buy-in and sponsorship for change initiatives</li> <li>• Continuously evaluate change strategy and design and introduce new approaches to enhance the institution's effectiveness</li> <li>• Build and nurture relationships with various stakeholders to establish strategic alliance in facilitating change</li> <li>• Take the lead in impactful change programs</li> <li>• Benchmark change interventions against best change practices</li> <li>• Understand the impact and psychology of change, and put remedial interventions in</li> </ul>	<ul style="list-style-type: none"> <li>• Sponsor change agents and create a network of change leaders who support the interventions</li> <li>• Actively adapt current structures and processes to incorporate the change interventions</li> <li>• Mentor and guide team members on the effect of change, resistance factors and how to integrate change.</li> <li>• Motivate and inspire others around change initiatives</li> </ul>	


  
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<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Change Leadership <sup>5</sup>			<b>10</b>
<b>Competency Definition</b>	Able to direct and initiate institutional transformation on all levels in order to successfully drive and implement new initiatives and deliver professional and quality services to the community			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
	strategic objectives and goals	place to facilitate effective transformation <ul style="list-style-type: none"> <li>• Take calculated risk and seek new ideas from best practice scenarios, and identify the potential for implementation</li> </ul>		

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<b>Cluster</b>	Leading Competencies			<b>Weight</b>
<b>Competency Name</b>	Governance Leadership <sup>6</sup>			<b>10</b>
<b>Competency Definition</b>	Able to promote, direct and apply professionalism in managing risk and compliance requirements and apply a thorough understanding of governance practices and obligations. Further, able to direct the conceptualisation of relevant policies and enhance cooperative governance relationships			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>• Display a basic awareness of risk, compliance and governance factors but require guidance and development in implementing such requirements</li> <li>• Understand the structure of cooperative government but requires guidance on fostering workable relationships between stakeholders</li> <li>• Provide input into policy formulation</li> </ul>	<ul style="list-style-type: none"> <li>• Display a thorough understanding of governance and risk and compliance factors and implement plans to address these</li> <li>• Demonstrate understanding of the techniques and processes for optimising risk taking decisions within the institution</li> <li>• Actively drive policy formulation within the institution to ensure the achievement of objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Able to link risk initiatives into key institutional objectives and drivers</li> <li>• Identify, analyse and measure risk, create valid risk, create valid risk forecast, and map risk profiles</li> <li>• Apply risk control methodology and approaches to prevent and reduce risk that impede on the achievement of institutional objectives</li> <li>• Demonstrate a thorough understanding of risk retention plans</li> <li>• Identify an implement comprehensive risk management systems and processes</li> <li>• Implement and monitor and formulation of policies, identify and analyse constraints and challenges with implementations and provide recommendations for improvement</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate a high level of commitment in complying with governance requirements</li> <li>• Implement governance and compliance strategy to ensure achievement of institutional objectives within the legislative framework</li> <li>• Able to advise Local Government on risk management strategies, best practice interventions and compliance management</li> <li>• Able to forge positive relationships on governance level to enhance the effectiveness of Local Government</li> <li>• Able to shape, direct and drive the formulation of policies on a macro level</li> </ul>	

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**7.5.5 COMPETENCY DESCRIPTION: CORE COMPETENCIES**

Cluster	Core Competencies			Weight
<b>Competency Name</b>	Moral Competence <sup>1</sup>			<b>5</b>
<b>Competency Definition</b>	Able to identify moral triggers, apply reasoning that promotes honesty and integrity and consistently display behaviour that reflects moral competence			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>Realise the impact of acting with integrity, but requires guidance and development in implementing principles</li> <li>Follow basic rules and regulations of the institution</li> <li>Able to identify basic moral situations, but requires guidance and development in understanding and reasoning with moral intent.</li> </ul>	<ul style="list-style-type: none"> <li>Conduct self in alignment with values of Local Government and the institution</li> <li>Able to openly admit own mistakes and weaknesses and seek assistance from others when unable to deliver</li> <li>Actively report fraudulent and activity of corruption within local government</li> <li>Understand and honour the confidential nature of matters without seeking personal gain</li> <li>Able to deal with situations of conflict of interest promptly and in the best interest of local government</li> </ul>	<ul style="list-style-type: none"> <li>Identify, develop, and apply measures of self-correction</li> <li>Able to gain trust and respect through aligning actions with commitments</li> <li>Make proposals and recommendation that are transparent and gain the approval of relevant stakeholders</li> <li>Present values, beliefs and ideas that are congruent with the institution's rules and regulations</li> <li>Take an active stance against corruption and dishonesty when noted</li> <li>Actively promote the value of the institution to internal and external stakeholders</li> <li>Able to work in unity with a team and not seek personal gain</li> <li>Apply universal moral principles consistently to achieve moral decisions</li> </ul>	<ul style="list-style-type: none"> <li>Create an environment conducive of moral practices</li> <li>Actively develop and implement measures to combat fraud and corruption</li> <li>Set integrity standards and shared accountability measures across the institution to support the objectives of local government</li> <li>Take responsibility for own actions and decisions, even if the consequences are unfavourable</li> </ul>	

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<b>Cluster</b>	Core Competencies			<b>Weight</b>
<b>Competency Name</b>	Planning and Organising <sup>2</sup>			<b>5</b>
<b>Competency Definition</b>	Able to plan, prioritise and organise information and resources effectively to ensure the quality of service delivery and build efficient contingency plans to manage risk			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>• Able to follow basic plans and organise tasks around set objectives</li> <li>• Understand the process of planning and organising but requires guidance and development in providing detailed and comprehensive plans</li> <li>• Able to follow existing plans and ensure that objectives are met</li> <li>• Focus on short term objectives in developing plans and actions</li> <li>• Arrange information and resources required for a task, but require further structure and organisation</li> </ul>	<ul style="list-style-type: none"> <li>• Actively and appropriately organise information and resources required for a task</li> <li>• Recognise the urgency and importance of tasks</li> <li>• Balance short and long-term plans and goals and incorporate into the team's performance objectives</li> <li>• Schedule tasks to ensure they are performed within budget and with efficient use of time and resources</li> <li>• Measure progress and monitor performance results</li> </ul>	<ul style="list-style-type: none"> <li>• Able to define institutional objectives, develop comprehensive plans, integrate and coordinate activities, and assign appropriate resources for successful implementation</li> <li>• Identify in advance stages and actions to complete tasks and projects</li> <li>• Schedule realistic timelines, objectives and milestones for tasks and projects</li> <li>• Produce clear, detailed and comprehensive plans to achieve institutional objectives</li> <li>• Identify possible risk factors and design and implement appropriate contingency plans</li> <li>• Adapt plans in light of changing circumstances</li> <li>• Prioritise tasks and projects according to their relevant urgency and importance</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on broad strategies and initiative when developing plans and actions</li> <li>• Able to project and forecast short, medium and long term requirements of the institution and local government</li> <li>• Translate policy into relevant projects to facilitate the achievement of institutional objective</li> </ul>	

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Cluster	Core Competencies			Weight
<b>Competency Name</b>	Analysis and Innovation <sup>3</sup>			<b>5</b>
<b>Competency Definition</b>	Able to critically analyse information, challenges and trends to establish and implement fact-based solutions that are innovative to improve institutional processes in order to achieve key strategic objectives			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>Understand the basic operation of analysis, but lack detail and thoroughness</li> <li>Able to balance independent analysis with requesting assistance from others</li> <li>Recommend new ways to perform tasks within own function</li> <li>Propose simple remedial interventions that marginally challenges the status quo</li> <li>Listen to the ideas and perspectives of others and explore opportunities to enhance such innovative thinking</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate logical problem solving techniques and approaches and provide rationale for recommendation</li> <li>Demonstrate objectivity, insight, and thoroughness when analysing problems</li> <li>Able to break down complex problems into manageable parts and identify solutions</li> <li>Consult internal and external stakeholders on opportunities to improve processes and service delivery</li> <li>Clearly communicate the benefits of new opportunities and innovative solutions to stakeholders</li> <li>Continuously identify opportunities to enhance internal processes</li> <li>Identify and analyse opportunities conducive to innovative approaches and propose remedial intervention</li> </ul>	<ul style="list-style-type: none"> <li>Coaches team members on analytical and innovative approaches and techniques</li> <li>Engage with appropriate individuals in analysing and resolving complex problems</li> <li>Identify solutions on various areas in the institution</li> <li>Formulate and implement new ideas throughout the institution</li> <li>Able to gain approval and buy in for proposed interventions from relevant stakeholders</li> <li>Identify trends and best practices in process and service delivery and propose institutional application</li> <li>Continuously engage in research to identify client needs</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrate complex analytical and problem solving approaches and techniques</li> <li>Create an environment conducive to analytical and fact-based problem-solving</li> <li>Analyse, recommend solutions and monitor trends in key challenges to prevent and manage occurrence</li> <li>Create an environment that fosters innovative thinking and follows a learning organisation approach</li> <li>Be a thought leader on innovative customer service delivery, and process optimisation</li> <li>Plan an active role in sharing best practice solutions and engage in national and international local government seminars and conferences</li> </ul>	



<b>Cluster</b>	Core Competencies			<b>Weight</b>
<b>Competency Name</b>	Knowledge and Information Management <sup>4</sup>			<b>5</b>
<b>Competency Definition</b>	Able to Promote the generation and sharing of knowledge and information through various processes and media, in order to enhance the collective knowledge base of local government			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>Collect, categorise and track relevant information required for specific tasks and projects</li> <li>Analyse and interpret information to draw conclusions</li> <li>Seek new sources of information to increase the knowledge base</li> <li>Regularly share information and knowledge with internal stakeholders and team members</li> </ul>	<ul style="list-style-type: none"> <li>Use appropriate information systems and technology to manage institutional knowledge and information sharing</li> <li>Evaluate data from various sources and use information effectively to influence decisions and provide solutions</li> <li>Actively create mechanisms and structures for sharing of information</li> <li>Use external and internal resources to research and provide relevant and cutting-edge knowledge to enhance institutional effectiveness and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Effectively predict future information and knowledge management requirements and systems</li> <li>Develop standards and processes to meet future knowledge management needs</li> <li>Share and promote best-practice knowledge management across various institutions</li> <li>Establish accurate measures and monitoring systems for knowledge and information management</li> <li>Create a culture conducive of learning and knowledge sharing</li> <li>Hold regular knowledge and information sharing sessions to elicit new ideas and share best practice approaches</li> </ul>	<ul style="list-style-type: none"> <li>Create and support a vision and culture where team members are empowered to seek, gain and share knowledge and information</li> <li>Establish partnerships across local government to facilitate knowledge management</li> <li>Demonstrate a mature approach to knowledge and information sharing with an abundance and assistance approach</li> <li>Recognise and exploit knowledge points in interactions with internal and external stakeholders</li> </ul>	

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Cluster	Core Competencies			Weight
Competency Name	Communication <sup>5</sup>			5
Competency Definition	Able to share information, knowledge and ideas in a clear, focused and concise manner appropriate for the audience in order to effectively convey, persuade and influence stakeholders to achieve the desired outcome			
ACHIEVEMENT LEVELS				
BASIC	COMPETENT	ADVANCED	SUPERIOR	
<ul style="list-style-type: none"> <li>• Demonstrate an understanding for communication levers and tools appropriate for the audience, but requires guidance in utilising such tools</li> <li>• Express ideas in a clear and focused manner, but does not always take the needs of the audience into consideration</li> <li>• Disseminate and convey information and knowledge adequately</li> </ul>	<ul style="list-style-type: none"> <li>• Express ideas to individuals and groups in formal and informal settings in a manner that is interesting and motivating</li> <li>• Able to understand, tolerate and appreciate diverse perspectives, attitudes and beliefs</li> <li>• Adapts communication content and style to suit the audience and facilitate optimal information transfer</li> <li>• Deliver content in a manner that gains support, commitment and agreement from relevant stakeholders</li> <li>• Compile clear, focused, concise and well-structures written documents</li> </ul>	<ul style="list-style-type: none"> <li>• Effectively communicate high-risk and sensitive matters to relevant stakeholders</li> <li>• Develop a well-defined communication strategy</li> <li>• Valance political perspectives with institutional needs when communicating viewpoints on complex issues</li> <li>• Able to effectively direct negotiations around complex matters and arrive at a win-win situation that promotes Batho Pele principles</li> <li>• Market and promote the institution to external stakeholders and seek to enhance a positive image of the institution</li> <li>• Able to communicate with the media with high levels of moral competence and discipline</li> </ul>	<ul style="list-style-type: none"> <li>• Regarded as a specialist in negotiations and representing the institution</li> <li>• Able to inspire and motivate others through positive communication that is impactful and relevant</li> <li>• Creates an environment conducive to transparent and productive communication and critical and appreciative conversations</li> <li>• Able to coordinate negotiations at different levels within local government and externally</li> </ul>	

<b>Cluster</b>	Core Competencies			<b>Weight</b>
<b>Competency Name</b>	Results and Quality Focus <sup>6</sup>			<b>5</b>
<b>Competency Definition</b>	Able to maintain high quality standards, focus on achieving results and objectives while consistently striving to exceed expectations and encourage others to meet quality standards, Further, to actively monitor and measure results and quality against identified objectives			
<b>ACHIEVEMENT LEVELS</b>				
<b>BASIC</b>	<b>COMPETENT</b>	<b>ADVANCED</b>	<b>SUPERIOR</b>	
<ul style="list-style-type: none"> <li>Understand quality of work but requires guidance in attending to important matters</li> <li>Show a basic commitment to achieving the correct results</li> <li>Produce the minimum level of results required in the role</li> <li>Produce outcomes that is of a good standards</li> <li>Focus on the quantity of output but requires development in incorporating the quality of work</li> <li>Produce quality work in general circumstances, but fails to meet expectation when under pressure</li> </ul>	<ul style="list-style-type: none"> <li>Focus on high priority actions and does not become distracted by lower-priority activities</li> <li>Display firm commitment and price in achieving the correct results</li> <li>Set quality standards and design processes and tasks around achieving set standards</li> <li>Produce output of high quality</li> <li>Able to balance the quantity and quality of results in order to achieve objectives</li> <li>Monitors progress, quality of work, and use of resources; provide status updates, and make adjustments as needed</li> </ul>	<ul style="list-style-type: none"> <li>Consistently verify own standards and outcomes to ensure quality output</li> <li>Focus on the end result and avoids being distracted</li> <li>Demonstrate a determined and committed approach to achieving results and quality standards</li> <li>Follow task and projects through to completion</li> <li>Set challenging goals and objectives to self and team and display commitment to achieving expectations</li> <li>Maintain a focus on quality outputs when placed under pressure</li> <li>Establishing institutional systems for managing and assigning work, defining responsibilities, tracking, monitoring and measuring success, evaluating and valuing the work of the institution</li> </ul>	<ul style="list-style-type: none"> <li>Coach and guide others to exceed quality standards and results</li> <li>Develop challenging, client-focused goals and sets high standards for personal performance</li> <li>Commit to exceed the results and quality standards, monitor own performance and implement remedial interventions when required</li> <li>Work with team to set ambitious and challenging team goals, communicating long- and short term expectations</li> <li>Take appropriate risks to accomplish goals</li> <li>Overcome setbacks and adjust action plans to realise goals</li> <li>Focus people on critical activities that yield a high impact</li> </ul>	

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8.3 The assessment of the performance of the Employee will be based on the following rating scale for KPIs and Leading Competencies and Core Competencies:

Level	Rating	Terminology	Description
	1 2 3 4 5		
5		Outstanding Performance	Performance far exceeds the standard expected of an employee at this level. The appraisal indicates that the Employee has achieved above fully effective results against all performance criteria and indicators as specified in the PA and Performance Plan and maintained this in all areas of responsibility throughout the year
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 al others throughout the year
3		Fully Effective	Performance fully meets the standards expected in all areas of the job. The appraisal indicates that the Employee has fully achieved effective results against all significant performance criteria and indicators as specified in the Performance Agreements and Performance Plan.
2		Not Fully Effective	Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against more than half the key performances criteria and indicators as specified in the Performance Agreements and Performance Plan.
1		Unacceptable Performance	Performance does not meet the standard expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the Performance Agreements and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.

8. For purpose of evaluating the performance of the **Employee** for the mid-year and year-end reviews, an evaluation panel constituted of the following persons will be established:

**28 | 2022 – 2023 Annual Performance Agreement: Chief Financial Officer**

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8.1 Municipal Manager

8.2 Chairperson of the Performance Audit Committee (PAC) or the Audit Committee (AC) in the absence of a performance audit committee

8.3 Member of the Mayoral or Executive Committee or in respect of a plenary type municipality, another member of Council.

8.4 Municipal Manager from another municipality; and

8.5 The manager responsible for human resources of the municipality must provide secretariat services to the evaluation panels.

## 9. SCHEDULE FOR PERFORMANCE REVIEWS

9.1 The performance of the Employee in relation to his performance agreement shall be reviewed on the following dates with the understanding that reviews in the third quarter may be verbal if performance is satisfactory:

Quarter	Review Period	Anticipated Review Dates
1	01 July 2022 – 30 September 2022	31 October 2022
2	01 October 2022 – 31 December 2022	31 January 2023
3	01 January 2023 – 31 March 2023	30 April 2023
4	01 April 2023 – 30 June 2023	31 July 2023

9.2 The Employer shall keep a record of the mid-year review and annual assessment meetings;

9.3 Performance feedback shall be based on the Employer's assessment of the Employee's performance;

9.4 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;

9.5 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.

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## 10. DEVELOPMENTAL REQUIREMENTS

10.1 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.

## 11. OBLIGATIONS OF THE EMPLOYER

11.1 The **Employer** shall:

11.1.1 Create an enabling environment to facilitate effective performance by the **Employee**;

11.1.2 Provide access to skills development and capacity building opportunities;

11.1.3 Work collaboratively with the **Employee** to solve problems and generate solutions to common problems that may impact on the performance of the Employee;

11.1.4 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

11.1.5 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.

## 12. CONSULTATION

12.1 The Employer agrees to consult the Employee timeously where the exercising of the powers will have amongst others:

12.1.1 A direct effect on the performance of any of the **Employee's** functions

12.1.2 Commit the **Employee** to implement or to give effect to a decision made by the Employer

12.1.3 A substantial financial effect on the Employer

12.2 The Employer agrees to inform the Employee of the outcome of any decisions taken pursuant to the exercise of powers contemplated in 11.1 as soon as is practicable to enable the Employee to take any necessary action without delay.

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### 12.3 MANAGEMENT OF EVALUATION OUTCOMES

- 12.3.1 The evaluation of the **Employee's** performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.
- 12.3.2 A performance bonus of 5% to 14% of the all-inclusive annual remuneration package may be paid to the Employee in recognition of outstanding performance to be constituted as follows:
- 12.3.3 A score of 130% to 149% is awarded a performance bonus ranging from 5% to 9%; and
- 12.3.4 A score of 150% and above is awarded a performance bonus ranging from 10% to 14%.
- 12.3.5 In the case of unacceptable performance, the **Employer** shall:
- 12.3.6 Provide systematic remedial or developmental support to assist the **Employee** to improve his or her performance;
- 12.3.7 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.

### 12.4 DISPUTE RESOLUTION

- i. Any disputes about the nature of the **Employee's** performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/or salary increment in the agreement must be mediated by-
- a) In the case of the Managers directly accountable to the Municipal Manager the Executive Mayor or Mayor within 30 days of receipt of a formal dispute from the employee, whose decision shall be final and binding on both parties.
- ii. Any disputes about the outcome of the **Employee's** performance evaluation must be mediated by-
- b) In the case of the Managers directly accountable to the Municipal Manager a member of the municipal council, provided that such member was not part of the evaluation panel provided for in sub regulation 27 (4) (e), within 30 (Thirty) days of receipt of a formal dispute from the **Employee**, whose decision shall be final and binding on both **Parties**.

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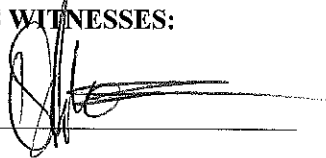
**13. GENERAL**

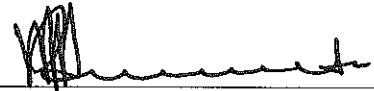
13.1 The contents of this agreement and the outcome of any review conducted in terms of Annexure A may be made available to the public by the **Employer**;

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.

Thus **done** and **signed** at Bela Bela.....on this the...22...day of July.....2022

**AS WITNESSES:**

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

**Chief Financial Officer**

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

Thus **done** and **signed** at Bela - Bela.....on this the...22...day of July.....2022

**AS WITNESSES:**

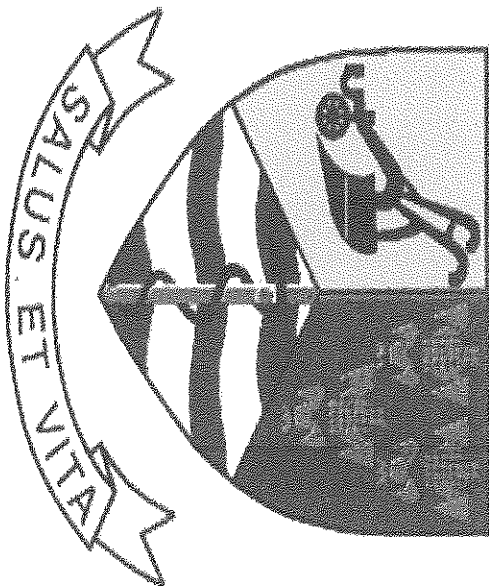
1.   
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**Acting Municipal Manager**

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

2022/2023 ANNUAL PERFORMANCE PLAN



NAME	RM MARUTHA
POSITION	CHIEF FINANCIAL OFFICER
SUPERVISOR	ACTING MUNICIPAL MANAGER
INSTITUTION	BELA-BELA LOCAL MUNICIPALITY
PERIOD	01 JULY 2022 TO 30 JUNE 2023

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## **COMPONENTS OF THE PERFORMANCE PLAN**

1. Purpose
2. Key Performance Areas
3. Strategic Intent
4. Key Performance Indicators
5. Assessment Rating Scales
6. Performance Assessment Process
7. Approval of the Performance Plan

### **1. PURPOSE**

The performance plan outlines the Council's performance expectations of the employee and the is a strategic intent to ensure that the development priorities and objectives as set in the Municipal Approved 2022/2023 Integrated Plan (IDP) and the Key Performance Indicators and targets in the Municipal Approved 2022/2023 Service Delivery and Budget Implementation Plan (SDBIP) are achieved through operational initiatives.

### **2. KEY PERFORMANCE AREAS**

The strategic Objectives of the Municipality are informed by the following Key Performance Areas as outlined in the Local Government: Municipal Planning and Performance Management Regulations (2001)

- 2.1 Basic Service Delivery and Infrastructure Development
- 2.2 Local Economic Development
- 2.3 Municipal Financial Viability
- 2.4 Municipal Institutional Development & Transformation
- 2.5 Good Governance and Public Participation
- 2.6 Spatial Rationale (Added)

### **3. STRATEGIC INTENT**

Vision:

“We are the prime agricultural hub and eco-tourism destination of choice”

Mission:

Our mission is to constantly strife towards the achievement of:

- An effective and efficient service delivery underpinned by

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- Stakeholder driven economic development and growth that fosters
- Sustainable job creation opportunities of communities within
- A safe, healthy and prosperous environment.

Values:

Bela-Bela municipality commits itself to adhere to the municipal core policies and values which are:

- Accountability
- Fairness
- Effectiveness
- Commitment
- Honesty and sincerity

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4. KEY PERFORMANCE INDICATORS AND SERVICE DELIVERY TARGETS: ANNEXURE A

Key Performance Area	Strategic Objectives	Project/ Programme	Key Performance Indicator (KPI)	Weight	Unit of measure (UoM)	KPI Code	Baseline 2021/2022	Annual Targets 2022/2023	2022/2023 QUARTERLY PERFORMANCE TARGETS				Evidence Required	Department	
									1st Quarter Targets	2nd Quarter Targets	3rd Quarter Targets	4th Quarter Targets			
<b>PRIORITY AREA: INSTITUTIONAL DEVELOPMENT &amp; TRANSFORMATION 10%</b>															
Good Governance and Public Participation	To improve Administrative and Governance Capacity	Council Administration	Number of Council meetings attended by 30 June 2023	5%	#	KPI 1	4 X Council meetings attended	4 X Council meetings to be attended	1x Council meeting to be attended	1x Council meeting to be attended	1x Council meeting to be attended	1x Council meeting to be attended	Notice of Council meetings	Corporate Services	
Municipal Transformation and Institutional Development	To improve Administrative and Governance Capacity	Council Administration	Number of Section 79 Committee meetings attended by 30 June 2023	5%	#	KPI 2	33 X Section 79 Committee meetings attended	33 X Section 79 Committee meetings to be attended	9 x Section 79 Committee meetings to be attended	6x Section 79 Committee meetings to be attended	9 x Section 79 Committee meetings to be attended	9 x Section 79 Committee meetings to be attended	Notice of Section 79 committee meetings	Corporate Service	
<b>PRIORITY AREA: GOOD GOVERNANCE AND PUBLIC PARTICIPATION 70%</b>															
<b>PRIORITY AREA: RISK AND INTERNAL AUDITOR</b>															
Good Governance and Public Participation	To improve administrative and governance capacity	Corporate Governance	Number of Audit Committee meetings attended by 30 June 2023	3%	#	KPI 3	4X Audit Committee Meetings attended	4 X Audit Committee Meetings to be attended	1 X Audit Committee Meetings to be attended	1 X Audit Committee Meetings to be attended	1 X Audit Committee Meetings to be attended	1 X Audit Committee Meetings to be attended	Signed Registers and Minutes	Office of the Municipal Manager	
Good Governance and Public Participation	To improve administrative and governance capacity	Corporate Governance	Number of Performance Audit Committee meetings attended by 30 June 2023	4%	#	KPI 4	2X Performance Audit Committee meetings attended	2X Performance Audit Committee meetings to be attended	1X Performance Audit Committee meetings to be attended	N/A	1X Audit Committee meetings to be held	N/A	Signed Attendance Registers and Minutes	Office of the Municipal Manager	
Good Governance and Public Participation	To improve administrative and governance capacity	Corporate Governance	Number of Risk Management meetings attended by 30 June 2023	3%	#	KPI 5	4X Risk Management meetings attended	4X Risk Management Meetings to be attended	1 X Risk Management Meetings to be attended	1 X Risk Management Meetings to be attended	1 X Risk Management Meetings to be attended	1 X Risk Management Meetings to be attended	Signed Attendance Registers and minutes	Office of the Municipal Manager	
<b>PRIORITY AREA: FINANCIAL VIABILITY 80%</b>															
Municipal Financial Viability and Management	To improve financial viability	Budget and Reporting	Number of Annual Financial Statements compiled and submitted to the Auditor General by 31 August 2022	4%	#	KPI 6	1 X 2020/2021 AFS compiled and submitted to the Auditor General	1x 2021/2022 AFS to be compiled and submitted to the Auditor General	1 X 2021/2022 AFS to be compiled and submitted to the Auditor General	N/A	N/A	N/A	N/A	2021/2022 AFS and Proof of Submissions to the Auditor General	Budget & Treasury

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Key Performance Area	Strategic Objectives	Project/ Programme	Key Performance Indicator (KPI)	Weight	Unit of measure (UoM)	KPI Code	Baseline 2021/2022	Annual Targets 2022/2023	2022/2023 QUARTERLY PERFORMANCE TARGETS				Evidence Required	Department
									1st Quarter Targets	2nd Quarter Targets	3rd Quarter Targets	4th Quarter Targets		
Municipal Financial Viability and Management	To improve financial viability	Budget and Reporting	Number of AG Action Plan for 2020/21 developed and submitted to Council by 31 January 2023	4%	#	KPI 7	1 X 2020/2021 Action Plan	1 X 2021/2022 AG Action Plan to be developed and submitted to Council	N/A	1x 2021/2022 AG Action Plan to be submitted to Council	N/A	2020/2021 AG Action Plan with Council Resolution	Budget & Treasury	
Good Governance and Public Participation	To improve administrative and governance capacity	Budget and Reporting	Obtain Unqualified Audit Report by 30 November 2022	4%	#	KPI 8	Obtain Disclaimer Audit Report for 2020/2021	Obtain Unqualified Audit Report for 2021/2022	N/A	N/A	N/A	Auditor General's Report	Budget & Treasury	
Municipal Financial Viability and Management	To improve financial viability	Budget and Reporting	Percentage of AG queries resolved as per the Action Plan by 30 June 2023	4%	%	KPI 9	31% of AG findings resolved for 2020/2021	100% of AG queries to be resolved for 2021/2022	N/A	50% of AG queries to be resolved	100% of AG queries to be resolved	Progress Report on the implementation of the Action Plan for 2021/2022	Budget & Treasury	
Municipal Financial Viability and Management	To improve financial viability	Budget and Reporting	Number of 2023/2024 Annual Budget approved by Council on or before the 31 <sup>st</sup> of May 2023	4%	#	KPI 10	1x 2022/2023 Annual Budget approved	1x 2023/2024 Draft and Final Annual Budget to be approved by Council	N/A	1x 2023/2024 Draft Annual Budget to be approved by Council	1x 2023/2024 Final Annual Budget approved by Council	Council Approved Draft and Final Budget with Council Resolutions	Budget & Treasury	
Municipal Financial Viability and Management	Improve Financial Viability	Budget and Reporting	Number of MFMA Section 71 Reports submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	3%	#	KPI 11	12x Monthly MFMA Section 71 Reports for 2021/2022 FY submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	12x Monthly MFMA Section 71 Reports for 2022/23 FY to be submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	3 X Monthly MFMA Section 71 Reports for 2022/23 FY to be submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	3 X Monthly MFMA Section 71 Reports for 2022/23 FY to be submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	3 X Monthly MFMA Section 71 Reports for 2022/23 FY to be submitted to the Mayor, Provincial and National Treasury by no later than 10 days after the end of each month	Section 71 Reports, Council Resolutions and proof of Submission to the Provincial and National Treasury	Budget & Treasury	
Municipal Financial Viability and Management	Improve Financial Viability	Budget and Reporting	Cash/cost coverage ratio of 1 - 3 months by 30 June 2023	3%	%	KPI 12	2 months norm	2 months norm	2 months norm	2 months norm	2 months norm	Monthly Report and Bank Statements	Budget & Treasury	
Municipal Financial Viability	Improve Financial Viability	Budget and Reporting	Annual liquidity ratio by 30 June 2023	3%	Ratio	KPI 13	2: 1 Ratio	2: 1 Ratio	2: 1 Ratio	2: 1 Ratio	2: 1 Ratio	Monthly reports	Budget & Treasury	

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Key Performance Area	Strategic Objectives	Project Programme	Key Performance Indicator (KPI)	Weight	Unit of measure (UoM)	KPI Code	Baseline 2021/2022	Annual Targets 2022/2023	2022/2023 QUARTERLY PERFORMANCE TARGETS				Evidence Required	Department
									1st Quarter Targets	2nd Quarter Targets	3rd Quarter Targets	4th Quarter Targets		
Viability and Management														
Municipal Financial Viability and Management	Improve Financial Viability	Expenditure Management	Percentage payment on budgeted capital projects identified for 2022/2023 financial year i.t.o. IDP by 30 June 2023	4%	%	KPI 14	100%	100%	25%	50%	75%	100%	Report	Budget & Treasury
Municipal Financial Viability and Management	To improve financial viability	Assets Management	Number of quarterly asset verification reports conducted - movables (sampling) compiled by 30 June 2023	3%	#	KPI 15	4 X quarterly assets verification for 2022/2023 FY to be conducted	4 X quarterly assets verification for 2022/2023 FY to be conducted	1 X quarterly assets verification for 2022/2023 FY to be conducted	1 X quarterly assets verification for 2022/2023 FY to be conducted	1 X quarterly assets verification for 2022/2023 FY to be conducted	1 X quarterly assets verification for 2022/2023 FY to be conducted	4x Sets of Quarterly asset verification reports	Budget & Treasury
Municipal Financial Viability and Management	To improve financial viability	Revenue Management	Number of Indigent Registers developed and verified by 30 June 2023	3%	#	KPI 16	1 X 2022/2023 Indigent register developed and verified	1 X 2023/2024 Indigent register to be developed and verified	N/A	N/A	N/A	1 X 2023/2024 Indigent register to be developed and verified	Approved Indigent register for 2022/2023	Budget & Treasury
Municipal Financial Viability and Management	To improve financial viability	Revenue Management	Percentage of Registered Indigents with access to Free Basic Services by 30 June 2023	3%	#	KPI 17	100%	100%	100%	100%	100%	100%	Billing Report and Indigent register	Budget & Treasury
Municipal Financial Viability and Management	Improve Financial Viability	Revenue Management	Percentage Maintenance of 95% debtors' collection rate (Consumer cash collected / Consumer billing) by 30 June 2023	4%	%	KPI 18	95%	95%	95%	95%	95%	95%	Monthly Report	Budget & Treasury
Municipal Financial Viability and Management	Improve Financial Viability	Expenditure Management	100% payments to creditors within 30 days by 30 June 2023	3%	%	KPI 19	100 % payments to creditors within 30 days	100% payments to creditors within 30 days	100% payments to creditors within 30 days	100% payments to creditors within 30 days	100% payments to creditors within 30 days	100% payments to creditors within 30 days	Quarterly Report	Budget & Treasury

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Key Performance Area	Strategic Objectives	Project Programme	Key Performance Indicator (KPI)	Weight	Unit of measure (UoM)	KPI Code	Baseline 2021/2022	Annual Targets 2022/2023	2022/2023 QUARTERLY PERFORMANCE TARGETS				Evidence Required	Department
									1st Quarter Targets	2nd Quarter Targets	3rd Quarter Targets	4th Quarter Targets		
Municipal Financial Viability and Management	Financial Stability	Supply Chain Management	Number of SCM Bid Committee Members and other officials trained by 30 September 2022	4%	#	KPI 20	5 X Bid Committee Members and other officials trained	5 X Bid Committee Members and other officials to be trained	N/A	N/A	N/A	Signed Attendance Register	Budget & Treasury	
Municipal Financial Viability and Management	Financial Stability	Supply Chain Management	Number of reports on the implementation of SCM Policy compiled and tabled to Council by 30 June 2023	3%	#	KPI 21	4 X SCM reports compiled and tabled to Council	4 X SCM Reports to be compiled and tabled to Council	1 X SCM Report to be compiled and tabled to Council	1 X SCM Report to be compiled and tabled to Council	1 X SCM Report to be compiled and tabled to Council	Reports with Council Resolutions	Budget & Treasury	
Municipal Financial Viability and Management	Financial Stability	Budget and Reporting	Number of Budget related policies reviewed and approved by 30 June 2023	4%	#	KPI 22	16 X Budget related policies reviewed and approved	16 X Budget related policies reviewed and approved	N/A	N/A	N/A	16 X Budget related policies to be reviewed and approved	Budget & Treasury	

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6. ASSESSMENT RATING SCALE

<p>5 Outstanding Performance</p> <p>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.</p>				
<p>4 Performance Significantly Above Expectations</p> <p>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.</p>				
<p>3 Fully Effective</p> <p>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 Agreements and Performance Plan.</p>				
<p>2 Not Fully Effective</p> <p>Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the Performance Agreements and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.</p>				
<p>1 Unacceptable Performance</p> <p>Performance does not meet the standard expected for the job. The review/assessment indicates that the employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the Performance Agreements and Performance Plan. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement.</p>				



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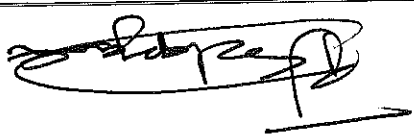

**7. PERFORMANCE ASSESSMENT PROCESS**

The following steps will be followed to ensure a fully participative and complaint performance assessment process is adhered to:

1. Performance Assessments
  - 1.1 Formal assessments between employee and employer will take place twice a year to measure the performance of the employee against the agreed performance targets.
  - 1.2 Progress against the targets will be captured in preparation for the assessments.
  - 1.3 Scores of 1-5 will be calculated based upon the progress against targets.
  - 1.4 Key Performance Indicators (KPI's) and targets are audited and copied to the performance plan before the assessment date.
  - 1.5 The employer must keep records of the assessment meetings.
2. The employee being assessed will compile a portfolio of evidence confirming the level of performance achieved for a given assessment period and made available to the panel on request.
  - 3.1 The employee to motivate for a higher rating where applicable
  - 3.2 The panel to rate the achievements for the KPI are on a 5 point scale. Decimal places can be used.
  - 3.3 The panel to rate the employee's core competency requirements (CCR) on the 5 point scale. Decimal places can be used.
  - 3.4 The panel scores are averaged to arrive at a total score per KPI / CCR. Overall scores are calculated by taking weights into account where applicable.
  - 3.5 The final KPA's rating will account for 80% of the final assessment total. The CCR are to account for 20% of the final assessment total.
4. The five point rating scale referred to in regulation 805 correspond as follows:
 

Rating	1	2	3	4	5
--------	---	---	---	---	---
5. The assessment rating calculator is used to calculate the overall % for performance.
6. The personal development plan can be (PDP) can be reviewed after the performance assessments had been finalised in case where more clarity has been established on what the essential development needs for the relevant employee will be.

8. APPROVAL OF THE PERFORMANCE PLAN

<p>This serves as a commitment between the employer and the employee that they will work together and support each other while struggling to achieve the goals of the Municipality as well as the personnel growth and development of the employee.</p>	
<p>Undertaking by the Employer/ Supervisor</p>	<p>Undertaking of the Employee</p>
<p>On behalf of the Municipality, I undertake to ensure that a work environment conducive for excellent employee performance is established and maintained. As such, I undertake to lead to the best of my ability, communicate comprehensively, and empower managers and employees. Employees will have access to ongoing learning, will be coached, and will be assisted to clearly understand what is expected of them, and herewith approve this performance plan.</p>	<p>I herewith conform that I understand the strategic importance of my position within the broader organisation. I furthermore confirm that I understand the purpose of my position, as well as the criteria on which my performance will be evaluated at least twice per annum. As such I therefore commit to do my utmost to work up to these expectations. I hereby accept this plan.</p>
<p>Signed and accepted by the Supervisor on behalf of Council:</p>	<p>Signed and accepted by the employee:</p>
	
<p>Date: 22/07/2022</p>	<p>Date: 22 July 2022</p>

9. PERSONAL DEVELOPMENT ACTION PLAN: ANNEXURE B

Skills Performance Gap	Outcomes Expected	Suggested Training / Development	Suggested Mode of Delivery	Suggested Time Frames	Support Person

Chief Financial Officer



Date: 22 July 2022

Acting Municipal Manager



Date: 22/07/2022

**DISCLOSURE OF FINANCIAL INTERESTS FORM: ANNEXURE C**

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**1. Shares and other financial interests (Not bank accounts with financial institutions.)**

See information sheet: note (1)

Number of shares/Extent of financial interests	Nature	Nominal Value	Name of Company/Entity
		N/A	

**2. Interest in a Trust**

Name of Trust	Amount of Remuneration / Income
	N/A

**3. Directorships and partnerships**  
See information sheet: note (3)

Name of corporate entity, partnership or firm	Type of business	Amount of Remuneration/ Income
	N/A	

**4. Remunerated work outside the Municipality**  
Must be sanctioned by Council. See information sheet: note (4)

Name of Employer	Type of Work	Amount of Remuneration/ Income
	N/A	

Council \_\_\_\_\_

Signature by Council \_\_\_\_\_

Date 22/07/2022

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**5. Consultancies and retainerships**  
See information sheet: note (5)

Name of client	Nature	Type of business activity	Value of any benefits received
		M/A	

**6. Sponsorships**  
See information sheet: note (6)

Source of assistance/sponsorship	Description of assistance/Sponsorship	Value of assistance/sponsorship
	M/A	

**7. Gifts and hospitality from a source other than a family member**  
See information sheet: note (7)

Description	Value	Source
	M/A	

**8. Land and Property**  
See information sheet: note (8)

Description	Extent	Area	Value
HOUSE	SESHOGO	SESHOGO	R380-000
Townhouse		BEKOR	R650-000
Townhouse		Polokwane	R1,200-000
Townhouse		Polokwane	R 780-000

SIGNATURE OF EMPLOYEE

DATE: 22 July 2022

PLACE: Bela Bela

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**OATH/AFFIRMATION**

1. I certify that before administering the oath/affirmation I asked the deponent the following questions and wrote down her/his answers in his/her presence:

(i) Do you know and understand the contents of the declaration?

Answer

YES

(ii) Do you have any objection to taking the prescribed oath or affirmation?

Answer

NO

(iii) Do you consider the prescribed oath or affirmation to be binding on your conscience?

Answer

YES

2. I certify that the deponent has acknowledged that she/he knows and understands the contents of this declaration. The deponent utters the following words: "I swear that the contents of this declaration are true, so help me God." / "I truly affirm that the contents of the declaration are true". The signature/mark of the deponent is affixed to the declaration in my presence.

Ek sertifiseer dat hierdie dokument 'n ware en oorspronklike dokument is, wat deur my persoonlik besigtig is, en sertifiseer dat volgens my waarnemings die oorspronklike dokument nie op enige wyse gewysig/verander is nie.

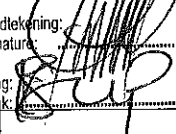
Commissioner **BELA-BELA MUNICIPALITY**  
**DEPT. SOCIAL & COMMUNITY SERVICES**  
**LICENSING**

Full first names and surname:  
**22-07-2022**

PRIVATE BAG X1609  
**BELA-BELA 0480**

(Block letters)

I certify that this document is a true reproduction/copy of the original document which was handed to me for authentication. I further certify that from my observations, an amendment or a change was not made to the original document.

Handtekening:  Naam in drukskrif: **CC S. RAMS**  
 Signature: Name in print:  
 Rang: **CCP** Infrastruktuur no: **113910792**  
 Rank: Infrastructure no:

Designation (rank) \_\_\_\_\_ Ex Officio Republic of South Africa

Street address of institution  
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## **CONSULTANCIES AND RETAINERSHIPS**

Designated employees are required to disclose the following details with regard to consultancies and retainerships:

- The nature of the consultancy or retainerhip of any kind;
- The name and type of business activity, of the client concerned; and
- The value of any benefits received for such consultancy or retainerships.

### **NOTE 5**

## **SPONSORSHIPS**

Designated employees are required to disclose the following details with regard to sponsorships:

- The source and description of direct financial sponsorship or assistance; and
- The value of the sponsorship or assistance.

### **NOTE 6**

## **GIFTS AND HOSPITALITY FROM A SOURCE OTHER THAN A FAMILY MEMBER**

Designated employees are required to disclose the following details with regard to gifts and hospitality:

- A description and the value and source of a gift with a value in excess of R350;
- A description and the value of gifts from a single source which cumulatively exceed the value of R350 in the relevant 12 month period; and
- Hospitality intended as a gift in kind.

Designated employees must disclose any material advantage that they received from any source e.g. any discount prices or rates that are not available to the general public.

All personal gifts within the family and hospitality of a traditional or cultural nature need not be disclosed.

### **NOTE 7**

## **LAND AND PROPERTY**

Designated employees are required to disclose the following details with regard to their ownership and other interests in land and property (residential or otherwise both inside and outside the Republic):

- A description and extent of the land or property;
- The area in which it is situated; and
- The value of the interest.

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