



CAPE WINELANDS DISTRICT
MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

INTERNSHIP POLICY

FEBRUARY 2015

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DATE OF IMPLIMENTATION:***

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1. DEFINITIONS

“BTO” - Budget and Treasury Office established in terms of section 80 of the Municipal Finance Management Act.

“DORA” - Division of Revenue Act.

“FMG” - Financial Management Grant.

“Internship” - a temporary position with an emphasis on on-the-job training rather than merely employment, and it can be paid or unpaid. If you want to go into publishing, you might have to take an internship before you are qualified for an actual job.

“Internship implementation team” - A team, comprising of the training coordinator and the intern’s immediate supervisors who carry out the certain functions.

“Mentors” - persons who guides less experienced persons by building trust and modelling positive behaviours.

“MFMA” - The Municipal Finance Management Act 56 of 2000.

“Municipal Finance Management Internship Programme (MFMIP)” - an attempt to build the municipalities capacity to deliver on their financial management responsibilities and thus their constitutional obligations. This programme was introduced in 2004 and forms a component of the Division of Revenue Act (DORA) Financial Management Grant (FMG) Framework conditions.

“Portfolio of Evidence (PoE)” - is a collection of documents which demonstrate knowledge based skills and work undertaken to be assessed as evidence to meet the required skills outcomes.

“Programme’s training coordinator” - The designated person from the municipality to which the interns will be exposed and need to be properly monitored if the objectives of the MFMIP are to be achieved within the duration of the internship.

“Personal Development Plan (PDP)” - is used to document and identify the knowledge, skills and abilities needed by the intern to perform efficiently in a particular department. It should also identify assignments to be given to the intern during his or her internship in a given department. Other matters that should be included in the PDP are formal training courses required and on-the-job training and the person(s) who will provide this training.

“Stipends” - A predetermined amount of money that is provided periodically to help offset expenses and are often provided to those who are ineligible to receive a regular salary in exchange for the duties they perform, such as interns.

2. SCOPE OF THIS POLICY

To give guidelines on how to manage and implementing the MFMIP in line with the government’s Skills Development Act and the Municipal Regulations on Minimum Competency Levels, Gazette 29967 of 15 June 2007 redesigned as a Municipal Finance Management Programme and the National Treasury’s MFMIP guideline version 2 of June 2014, for ease of delivery and compliance by all officials responsible for financial management.

3. PURPOSE OF THIS POLICY

- 3.1** To encourage the Municipality to provide opportunities for new entrants to the labour market to gain work experience.
- 3.2** To improve the employment prospects of persons previously disadvantaged by unfair discrimination and to redress those disadvantages through training and education.
- 3.3** To acknowledges the challenges of skills development and capacity building, and of learners who are interested to learn and gain experience in the activities of Local Government.
- 3.4** A priority in general is for the learners to be trained in financial field, to gain work experience.

4. BACKGROUND

Capacity building is a long term process that must be seen as an attempt to build individual, organisational, institutional and environmental processes to strengthen the service delivery mandate of organisations including municipalities.

There are a number of opportunities presented by the macroeconomic challenges of unemployment of graduates not able to find employment opportunities for all municipalities’ consideration. Such opportunities cover the in-house development of the talent pipeline for utilisation on future municipalities capacity needs. If the MFMIP is implemented appropriately, this programme may serve as the long lasting solution to the talent pipeline needed by the Local Government Sector in these specialised financial management areas

The MFMIP specifically, encourages municipalities to employ unemployed graduates in Accounting, Economics, Finance, Risk management and Internal Auditing, among others, over a multiyear period in line with the issued conditions.

5. THE MFMIP

The MFMIP provides interns preferably recruited from previously disadvantaged backgrounds with a logical training sequence founded on the knowledge they acquired from tertiary institutions. Through workplace interaction with and mentoring by chief finance officers, municipal managers, other officials within the Budget and Treasury Office and/or advisors where present, the interns will benefit from the expertise and experience of these officials. The two to three-year programme is expected to end, where appropriate, with the awarding to each intern with a professional qualification in Municipal Finance Management Programme to strengthen the chances of permanent retention within the same or neighbouring municipalities at the onset.

6. SELECTION

Appointment interns must be consistent with the FMG framework conditions which are as follows-

- Must be holders of a three-year Bachelor's Degree or National Diploma;
- Major concentrations in Economics, Accounting or Finance, Internal Auditing or Risk Management;
- Be in line with employment equity requirements;
- Will be required to sign an internship agreement; and
- In addition to an employment contract, committing themselves to full participation in the educational and workplace assignments in accordance with laid-down policies and procedures.

7. DURATION

The duration of the internship contract must be minimum 24 months and maximum 36 months. During the period of the internship contract, the interns must have covered at least 80% of the areas listed in their contracts. The Municipality may extend the interns contract only under the following circumstances:

- The interns are still in the process of completing their training on the regulated programme, MFMP;
- The municipality is of the view that interns still have gaps in their learning; and
- There are no immediate vacant positions against which to appoint interns who have completed their training but some would be emerging in within a short while.

The Municipality must, three (3) months before the expiry of the contract, inform both the National and Provincial Treasury of their intention to extend or terminate the interns' contract including any appointments to date

8. STIPENDS

8.1 Interns are paid a stipend and **NOT** a salary. A municipality shall pay the interns a stipend of a maximum of **R100 000** per annum per intern as total cost to the municipality. If the municipality wishes to pay more than the recommended R100 000, then the excess of **R100 000** must be sourced from its own MTREF budget.

8.2 Should an intern breach the contract in place by resigning, the Municipality may enforce the contract by asking the intern to pay back all the training related costs. On the same note, the Municipality must do everything possible to retain trained interns' at appropriate levels for sustainable capacity building efforts. The same performance information must be shared with both National and Provincial Treasury as outlined elsewhere above.

9. RESPONSABILITIES OF PARTIES

9.1 Municipality

A suitable and dedicated person within the existing staff complement must act as the programme's training coordinator to -

- plan the training activities by identifying and addressing the interns' skills gaps;
- appoint an accredited education and training provider(s) to deliver the regulated programme;
- provide, on an on-going basis, on-the-job and formal but practical training;
- constantly monitor the progress of the interns;
- avoid using interns for perpetual permanent responsibilities without affording them an opportunity for work rotation; and
- avail permanent retention opportunities to interns through a formal process of interview among others.

9.2 Interns

Interns must regard this programme as an opportunity to learn Local Government Municipal Finance Management and thus an opportunity to further their careers in Local Government. If this objective is to be realised, interns have to-

- be receptive to the training support provided by the Municipality through any of the delegated officials in this regard;
- obey all policies and procedures of the Municipality in respect of work process, ethics and ethos, among others;
- take ownership of their own personal development by initiating self-directed learning and requesting clarifications if need be through the nominated mentors and coaches;
- present themselves for a possible placement against any of the suitable positions within the BTO; and
- compile the necessary documentation required to monitor their learning progress.

10. TRAINING

- 10.1** Interns' service delivery tasks and duties are twofold oriented towards, firstly, learning and, secondly, adding value through a tangible contribution to the operations of municipalities.
- 10.2** The training philosophy requires that in the process of learning new skills the interns be required to demonstrate that they are capable of applying what they learn in a tangible "value-added" way.
- 10.3** Interns must not perform routine process-oriented functions that are normally covered by full-time employees. If the situation is beyond the control of the Municipality due to unbudgeted positions, this must be managed closely and not last until the end of the interns' contract. Interns must be given an opportunity to learn different responsibilities under the BTO.
- 10.4** In planning their training, the internship implementation team should bear in mind that interns will be making careers in which information technology is the norm. It follows that computer literacy must be acquired as part of the main training areas of municipal finance management.
- 10.5** The internship programme requires that training be spread evenly over the term of the contract. The training coordinator of the programme may have to discourage any attempts by interns to obtain experience in the various

identified training areas at the same time and over a shorter period lest the planned skills and knowledge are not entrenched.

11. MANAGEMENT OF THE PROGRAMME

11.1 A well-documented structure for managing the programme is imperative, which should be coordinated by the Human Resources Manager or nominated official within this unit.

11.2 An internship implementation team, comprising of the training coordinator and the intern's immediate supervisors, must be established to carry out the following functions:

- Facilitate the planning, preparation and implementation of the internship programme;
- Compile a budget for the internship programme;
- Develop a communication strategy with all stakeholders on internship programme;
- Establish an administration system to support the internship programme;
- Liaise with coordinators of other municipalities involved in the programme to share best practices;
- Establish criteria for mentor selection;
- Implement criteria for intern selection in line with these guidelines;
- Coordinate the identification and selection of interns;
- Coordinate on-the-job and off-the-job structured learning;
- Liaise with the appointed education and training provider(s) to deliver the regulated programme;
- Take collective responsibility to monitor progress on an on-going basis.

12. PERSONAL DEVELOPMENT PLAN (PDP)

12.1 A PDP must be prepared for interns, with inputs from the Municipal Manager (MM), Chief Financial Officer (CFO), Human Resources Manager and assistance from the advisor (if available), immediately after the initial orientation session. These serve as road maps for developing interns so that they acquire the knowledge, skills and abilities to perform at the expected rank

of a Municipal Financial Officer. The PDP is prepared by each intern with the assistance of the training coordinator and approved by the internship implementation team or delegated supervisor.

12.2 The PDP serves as the basis of the intern's performance plan and will therefore serve as a key results document if one is needed to manage the relationship between the Municipality and the intern. Supervisors may incorporate the PDP into the performance plan and add performance criteria to complete this plan. Elements not covered by the PDP, if appropriate to the job, may be added to the performance plan. A sample PDP has been included as **Annexure A**.

13. PORTFOLIO OF EVIDENCE (PoE)

13.1 The purpose of the PoE is to document internship experience for later use by interns to complete an exit evaluation that will confirm the intern's competencies acquired during their contract. Interns are required to develop a portfolio of evidence of the experience gained during the internship programme including the work Rotation Plan signed off by the respective supervisors.

13.2 Interns are required to have their own PoE, which should be shown to the mentor and CFO to prove their competence in areas of the internship. Guidelines regarding the Preparation of the PoE are shown in **Annexure B** and the role of the PoE is shown in **Annexure C**.

14. MENTORS

14.1 Sound implementation of the internship programme requires that mentors be identified to support interns' on-the-job learning the Chief Financial Officer, in consultation with the Human Resources Manager assists interns to identify their mentors. In the context of these guidelines, a mentor is deemed to be a counsellor, head of the BTO unit, tutor or coach.

14.2 A mentor be someone who is an expert in the relevant field within the area of study in the BTO structure. The mentor-intern relationship requires special attention and care to ensure that all the parties involved meet expectations and undergo a fulfilling and rewarding professional experience. Although he/she may wear many hats, the mentor's distinguishing characteristic is a commitment to the intern's professional and personal development.

14.3 This role be shared equally among supervisors as and when interns rotate within the BTO structure in line with their work rotation plans.

14.4 As a motivator, the mentor can encourage the interns to accept challenges they might otherwise shy away from. Consciously or unconsciously, good mentors know that it is far more important to empower than to teach.

14.5 The mentor can serve as a networking resource, guiding the intern toward opportunities. While not an expert on everything, the mentor can help identify the correct source for information. A more detail outline of the role of a mentor is given in **Annexure D**.

15. DUTIES OF TRAINING COORDINATOR

The municipal official required to assume the responsibilities of a Training Coordinator is expected to –

- act as a point of liaison between the Municipality and the National and relevant Provincial Treasury in matters pertaining to the respective interns;
- familiarise himself/herself with internship guidelines (this document) and advise the Municipality in this regard, as required;
- act on behalf of municipalities in all contractual documents relating to these guidelines;
- keep the management of the Municipality and interns informed of all changes affecting the internship programme;
- ensure that the interns employed by the Municipality have access to all the relevant instruments, documents and space to train;
- establish that prospective interns possess the necessary minimum qualifications to enter into internship contracts;
- keep and maintain appropriate records or portfolio of evidence of the training experience of all interns under their control;
- plan the training programme of interns;
- inform both National Treasury and Provincial Treasury of any breaches of conditions of the internship;
- notify both National Treasury and Provincial Treasury when interns contracts are about to expire and request the necessary extension or notification of absorption to enable these stakeholders to update their records accordingly;
- provide such information as the National and Provincial Treasury may require in the arbitration of a dispute between the employing municipality and an intern; and
- provide both National and Provincial Treasury with quarterly updates pertaining to the number of interns in the Municipality.

16. PRIORITY TRAINING AREAS

16.1 All interns must complete the freely available 6 modules of the MFMA Interactive DVD Learning to give them a broad overview of the MFMA and the related reforms.

16.2 The following priority training areas must be included when formulating a training action plan:

- Strategic Management, Budgeting implementation and Performance Management;
- Accounting and Risk management;
- Governance and Legislation;
- Cost and Capital planning;
- Municipal IT support and Project Management;
- SCM and PPP;
- People Management.

16.3 The exact internship activities carried out by an intern are bound to reflect skills identified in the personal development plan and the regulated minimum competency levels.

17. TRAINING RECORDS

The training coordinator must keep a record of an intern's practical training experience from the date of the intern's first appointment. The record of practical training experience should be kept in a suitable form to enable evaluation of recorded work-based skills. An intern who fails to participate in the completion of relevant training records contravenes an important requirement of the internship contract. The records consist of:

- Weekly/Monthly training plans;
- Signed evaluation forms; and
- Evaluation outcomes.

18. EVALUATION OF THE TRAINING PROGRAMME

It is important to ensure that learning and skills development activities during the internship are evaluated so as to determine their suitability for the municipal finance management internship outcomes. Evaluation is done in order:

- to determine whether training objectives are being achieved;
- to gain information on how to improve the training;
- to decide whether to continue, expand or eliminate the training;

- to assess training and learning activities as they relate to improved organisational performance; and
- to identify gaps and recommend corrective actions.

19. SUPERVISOR RESPONSABILITIES

19.1 The Municipality must identify an experienced official e.g. supervisor to be responsible for the day-to-day management of the interns. This supervisor should ideally be located in the Budget and Treasury Office. There is a possibility for a supervisor to also play a mentorship role depending on the capacity of the municipality to avail experienced officials to undertake the dual roles. Therefore, these guidelines provide municipalities with liberty to apply their minds in this regard for efficient and practical implementation of the programme.

19.2 It is required from the Supervisor to perform the following duties -

- Familiarise him / her with the governing requirements related to the internship programme including these guidelines;
- Meet regularly with the intern to review and discuss the intern's training progress and career goals;
- If the intern is having difficulty in obtaining experience in certain areas, suggest additional training and supplementary educational activities that may be helpful;
- Recognise the ethical responsibilities inherent in the supervisor/mentor-intern relationship;
- Be available as needed to provide assistance, advice and support;
- Listen attentively and respond empathetically to questions and concerns raised by the intern; and
- Be receptive to feedback and new ideas.

20. MONITORING BY SUPERVISOR

20.1 The supervisor must agree with the interns on the practical schedule of meetings to review, assess and evaluate the intern's experience on the programme.

The supervisor will review the following:

- The work done by the intern since the last review;
- The role of the intern;
- Steps that can be taken by the intern to address deficiencies in the practical training process;
- Examples of work executed by the intern;
- Internship-related problems experienced, and possible solutions;
- The extent to which the goals and objectives established in earlier meetings have been fulfilled;
- Career-related issues; and
- Acknowledge good work and motivate the intern.

20.2 At the end of the meeting, the Supervisor must document all work activities discussed with the intern.

21. EVALUATION OF INTERNS

21.1 The Municipality are responsible for evaluating the interns every four months. During the work period, interns must be provided with the necessary feedback on work done as per their daily logbook. Interns must also be given written feedback, within seven days of completing a relevant work assignment, by the head of the relevant department (or the supervisor assigned to the intern) on the extent to which they are meeting the programme's requirements and performance expectations. Such feedback should include –

- written notification of progress and related challenges (if any) that have been noted and the opportunity to discuss them;
- guidance regarding remedial steps (if remediable); and
- Substantive written feedback on the extent to which corrective actions are (un) successful in addressing the issues of concern.

21.2 For purposes of evaluation, interns are expected to be competent in all the priority training areas. Interns are considered competent if they are capable of executing tasks with minimal supervision.

22. LEAVE OF ABSENCE

22.1 Study leave -The Municipality shall give interns study leave in case they are attending the regulated MFMP training and for any qualifications that relates to the Municipal Finance;

22.2 Annual leave - The annual leave shall be according to the Municipality's policy and /or the agreement as per the internship contract;

22.3 Maternity leave - The Municipality shall use its own discretion, in line with its Human Resource policies to deal with maternity leave;

22.4 Other leave - The Municipality shall use its own discretion, in line with its Human Resource policies to deal with any other leave request.

23. MODEL FOR PERMANENT PLACEMENT

- The Municipality could amend the BTO organisation structure (with Municipal Council approval) to include internship programme as a two year stepping stone towards the appropriately identified permanent positions.
- The interns must on appointment be given permanent placement in line with the above given consideration;
- The recommended and reasonable salary for placement on the identified position after a two year migration may be +20% of interns' stipend or whatever it is reasonable based on the position. However, the municipality may remunerate more if the budget allows and provision for this purpose has been made.

24. CANCELLATION OF THE PROGRAMME

In view of the legal nature of the Municipal Finance Management Internship Contract and to avoid the possibility of an action for damages suffered as a result of breach of contract, the parties should formally record their agreement to cancel the contract.

The intern's contract may be cancelled due to the following circumstances:

- If the intern is in breach of the internship contract;
- If the intern fails to report for work even though he or she is not entitled to leave or sick leave in terms of the employment contract;
- If the interns fails to attend scheduled training and also does not submit the required POE as per the scheduled time; and

- If the intern commits a criminal offence relating to corruption, fraud and related offences.

ANNEXURE A: Sample Personal Development Plan

Introduction

National Treasury is committed to the personal and professional development of all municipal finance management interns. This personal development plan (PDP) offers interns a means to analyse their own development needs, set specific short and long-term goals and decide which opportunities best meet those needs and goals in line with the municipal financial management internship outcomes. The PDP will also assist the immediate mentor or supervisor in supporting the intern's development.

The PDP process should stimulate useful introspection and focus planning. The PDP should be reviewed every four months and updated annually. The intern should keep one copy, provide his or her immediate supervisor or mentor with one copy and file the original with the municipality's human resource unit.

Completion of the PDP is compulsory as it is part of the internship process. It may therefore require inputs from the Municipal Manager, CFO and Training Coordinator in some cases.

Definition of terms to be used in the PDP:

- Short-term – will be accomplished in one to two years;
- Long-range – accomplished within five years
Personal goals – those skills or activities the intern would like to undertake because they will improve his or her personal life, e.g. time management skills in order to improve the work and personal environment;
- Professional goals – those activities that will contribute to the effectiveness of what the intern is currently doing and plans to do (e.g. database management; preparation for a professional qualifying examination; refining of leadership skills in order to apply for a new position);
- Career goals – activities undertaken to advance the intern within the municipality structures beyond what he or she is currently doing.

Goal setting

This section is mandatory:

- List your short-term individual/professional/career goals (one year);
- List your long-range individual/professional/career (five years).

- Interns are expected to set their own goals and not work on what they feel others think they should do. The goals should be:

S – specific
M – measurable
A – achievable
R – realistic
T – time-bound

Interns need to prepare their own PDP with the assistance of a mentor and the Training Coordinator.

PERSONAL/PROFESSIONAL PROFILE – SELF-ASSESSMENT

Name: _____

Job title: _____

Department/Directorate: _____

Address: _____

E-mail: _____

Phone: _____

The following section is optional; you may work on it on your own:

- At what stage of your career are you now?
- At what stage of your life are you?
- Where do you want to be in your career life in five years' time?
- What do you want to be doing in your personal life in five years' time?
- List your strengths, interests and areas of proficiency or areas of potential growth

PROFESSIONAL DEVELOPMENT ACTIVITIES

Indicate the specific programmes you wish to take advantage of to support your goals.

List training, workshops or classes that you would like to attend to achieve your goals:

Other activities

For assistance in developing your PDP, call **Mentor/Supervisor** on.....

Once the personal development plan (PDP) has been completed, the mentor, the training coordinator and the intern should sign it and include it with the intern's evaluation material.

Intern's signature _____ Date: _____

Mentor/supervisor's signature _____ Date _____

ANNEXURE B: Preparation of the professional Portfolio of Evidence

Interns are required to have their own portfolio of evidence that can be shown to the mentor/supervisor or a delegated official to prove the intern's competence in certain areas of the internship. A portfolio maintained by an intern must contain the following:

- A copy of the intern's identity document or passport
- A brief curriculum vitae (CV) showing the following personal details:
 - Academic achievements and dates (highest educational level)
 - Employment details such as dates, organisation, jobs held, positions held, extent of function, extent of responsibility, specialist duties performed and other personal experience
 - Evidence in the form of copies of membership of relevant bodies, relevant licenses, relevant qualifications, formal and informal education certificates, diplomas and credits achieved, and attested affidavits of lost records
- A copy of the skills development training programme for interns
- Periodic evaluation feedback from the Supervisor
- The intern's self-evaluation reports
- The intern's mentor's name, job title, contact telephone number and e-mail address.
- A copy of the internship contract.

The process of portfolio development can be labour-intensive and time-consuming. Interns should thus start collecting potential documents early in the internship and keep a reflective journal to remind them how these documents contributed to their professional growth and accomplishments.

The professional portfolio of evidence represents a carefully selected collection of exemplary documents that highlight the intern's best work and accomplishments. It should be organised around the internship programme objectives identified in the internship plan. An easy way for the intern to do this is to divide the portfolio into labelled sections, one for each personal objective. A table of contents is essential to the portfolio, regardless of how the intern chooses to organise work-related experiences. Using a table of contents in conjunction with colour coded section tabs is recommended for ease of inspection.

At the beginning of the portfolio, an introduction should provide an overview of the materials that follow. The introduction may include professional goals and commitments, an overview of the objectives of the internship programme and their relationship to the intern's professional goals, the rationale for the inclusion of the documents that follow and comments about how the documents support the objectives of the internship.

ANNEXURE C: The Portfolio of Evidence

1. Objectives

The objectives of this annexure are threefold:

- To demonstrate the importance of preparing and utilising portfolios in the Municipal Finance Management Internship;
- To highlight the component parts that are to be included in an intern's professional portfolio of evidence;
- To develop an understanding of how an intern can compile and present his or her portfolio in a professional manner.

2. Preliminary activities

Itemised below are activities to help Municipal Finance Management Interns attain the required objectives regarding preparation of a professional portfolio of evidence. The interns will be close to meeting the stated objectives if they –

- read through this guide to understand the basic dynamics of portfolio preparation;
- ask the training coordinator, career advisor or mentor about portfolio preparation and related activities that are most appropriate for their career planning needs.

In the present competitive labour market, effectively showcasing relevant knowledge and skills to an employer is critical to a successful career. Along with a tailored résumé, a professional portfolio of evidence can help provide further evidence of professional qualifications, skills, knowledge and abilities. The purpose of this annexure to the municipal finance management internship guidelines is to assist interns in organising their own professional portfolio of evidence and using it as a tool in professional development.

3. Meaning of a portfolio of evidence

A portfolio is a personalised collection of materials. There are two types of portfolios: personal and professional. In a personal portfolio, the focus is generally on specific life events, for example one's birth, graduation and wedding. This type of portfolio highlights memories that are more personal in nature. This annexure focuses on the creation of a professional portfolio.

A professional portfolio of evidence –

- provides a reflection of an intern as a professionally minded person;
- provides a record of an intern's educational and work-related activities undertaken for professional development purposes;
- shows how an intern performs/excels on the job or in the formal educational environment;
- provides information on what an intern has accomplished, i.e. tangible evidence required for the evaluation of technical skills;
- provides information on efforts made by an intern at developing and acquiring new skills.

4. Needs served by a portfolio of evidence

- It forms a basis for the evaluation of technical skills relevant to the Municipal Finance Management Internship;
- It markets the intern's capabilities in job assessments;
- The intern may use portfolio of evidence (POE) as a tool to negotiate promotions and raises;
- The intern will find a POE useful in support of applications for bonuses, scholarships, or grants;
- A POE may also serve as documentary proof of the quality and quantity of an intern's professional development;
- The intern may use a POE to demonstrate prior work or learning experiences for educational credit, normally granted where recognition of prior learning is formalised.

5. Material that can be included in a professional portfolio of evidence

Items to be included in the POE include the following:

- Résumé or curriculum vitae (interns are encouraged to ask the training coordinator or their mentors for information on curriculum vitae preparation);
- Signed internship and employment contract;
- MFMA Interactive DVD Learning certificates;
- Transcripts from schools and/or universities attended;

- Evidence of professional affiliations and memberships;
- Licenses or professional certifications;
- Letters of reference and commendation;
- Evidence of specific skills (e.g. public speaking, leadership, report writing) and related assessment feedback;
- Work samples (e.g. class projects, items produced during internship or co-op experiences) and the related assessment feedback;
- Work-related evaluations by supervisors and peers.

As can be observed from the above, interns' POEs can comprise quite a varied collection. During an assessment of technical skills, it would be impossible and unwise to go through every item with the assessor. A better approach is to select items from the POE to be included in a smaller assessment portfolio. This portfolio can be presented during an assessment to add evidence of important knowledge or skills interns possess that are relevant to the municipal finance management internship programme. The interns are advised to take their cue from the assessor's instructions with regard to an appropriate number of items required in any given assessment of internship outcomes.

6. Advantages of developing and using an assessment portfolio

Assessment portfolios should include the best examples of interns' skills and abilities from their POEs that are particularly relevant to the technical skills and knowledge to be assessed. When interns customise their assessment portfolio to the requirements of the specific internship outcomes, it demonstrates that they have done their work assignments and understood the nature of the outcomes being assessed.

Developing a POE helps interns prepare themselves for technical skills assessments by allowing them to think critically about their work experiences and accomplishments. When preparing for an assessment of technical skills, this process will enable interns to highlight specific experiences that led to the development of valuable workplace skills. In addition, preparing a POE allows interns to see how well their professional developments match the outcomes of the Municipal Finance Management Internship.

7. Points on compiling an assessment portfolio

- Place items in a loose-leaf binder;
- Use sheet protectors;
- Use copies (keep a master copy of all items);

- Make use of index tabs and/or title pages to separate the sections;
- Keep it to a manageable size;
- Leave out page numbers to make it easier to add and move items around;
- Make use of consistent headings and placement of work samples;
- Put sections together according to what the Assessor will be looking for (training outcomes);
- Ensure that it looks professional and is error-free.

8. POE presentation format

A. Introductory title page

B. Table of contents

The table of contents can be organised in one of two ways:

- Chronologically: Sections are packaged according to the job description and date the portfolio samples represent. This organisational scheme will help an individual who has been in a particular field over time demonstrate increasing improvement and accomplishment;
- Functionally: Sections are packaged according to job description only. For example, sections may be packaged under the heading of “Computer Skills”, “Financial Reporting” and “Legislation”. This organisational scheme works well when an individual has varied experiences that need to be pulled together to demonstrate ability in specified areas.

C. Work-related evidence

The sample technical evaluation form and daily logbook are to be used to support work-related evidence an intern may adduce on assessment. Where possible, provide a reflection statement in either paragraph or bulleted format that contains the following information:

- A brief description of the outcome/skill demonstrated and the context in which the skill or outcome was noted (e.g. “Drew up the agenda and arranged a venue for orientation of finance clerks on 30 January 2004” or “Chaired a meeting for the payroll office on 24 March 2003”);
- A detailed list of the competencies developed or revealed through technical evaluation (It is this second part of the reflection statement that makes the portfolio element especially useful in the assessment process)

9. Assessment portfolios

Assessment portfolios should –

- look professional;
- reflect an individual's actual skills and knowledge;
- be occupationally and outcomes-focused ;
- be easy to update;
- be easy for the assessor and supervisor to review quickly; and
- be able to stand alone without explanation; support information presented in the résumé.

10. Using an assessment portfolio

Before interns attend an assessment, it may be beneficial for them to role-play using their assessment portfolio with friends or colleagues. This exercise will help them feel more at ease in handling their portfolio during an assessment. Once at the assessment venue, interns should “relax” and look for opportune moments to use their portfolios to address assessor questions. Remember that interns' assessment portfolios include reflection statements, which should make it easier for them to feel confident in showcasing their abilities to an assessor. In addition, interns' assessment portfolios can help remind them of information they wish to share with an assessor if their nervousness is likely to get the better of them.

11. Electronic portfolios

Electronic portfolios use interactive multimedia to increase the range and type of materials that can be included as evidence of learning. They take full advantage of the advanced capacity of desktop computers to include text, graphics, animation, sound and video. There may come a day when the majority of assessors and supervisors require interns to submit electronic portfolios.

ANNEXURE D: The role of a mentor in the development of a Municipal Finance Intern

1. Introduction

You can ask any accomplished professional who their mentor was as they developed their professional career and every one of them will be able to name at least one person immediately. No one gets to the front without some help – and out in front is where an accomplished professional would like to be. The importance of a role model in the municipal finance management interns' professional development cannot be overemphasised. In the context of the Municipal Finance Management Internship Programme, a mentor is someone who models behaviour, offers advice and criticism and allows the intern to advance his or her own career.

The National Treasury (NT) recommends that Municipal Finance Management Interns should, with the help of the CFO and the Municipal Manager, identify mentors at the beginning of their internship programme. Once a mentor is appointed, preferably at the beginning of the municipal financial year, it is recommended that their roles in supporting these talent pipelines be recognised accordingly as a performance deliverable. This will ensure that the Municipality takes ownership of the interns' development, among others. The NT has a few hints to help interns in selecting these persons, as well as some do's and don'ts about working with mentors.

2. Where interns can find mentors

Mentors surface in the strangest places. Municipal Finance Management Interns cannot simply select someone and then just attach themselves in order to soak up experience, skills and information. Owing to the fact that the mentorship process works as a two-way operation, the mentors must agree to work with the interns and must have some interest in their future professional development. It follows that one of the criteria is proximity. The interns' mentors must be close enough to them geographically to permit them to obtain timely and relevant feedback. The NT wishes to suggest to interns to look in their own municipality for accomplished accounting and finance professionals. The CFO or other officers and international advisors in the interns' municipality or neighbouring municipalities may be good potential mentors. A staff member employed by the interns' municipality might be a good mentor if that person has coaching, financial management and leadership skills.

A second criterion is financial management experience. The interns' mentor should be someone who has demonstrated financial management leadership qualities from which interns can learn as their own professional skills emerge. Municipal Finance Management Interns associated with professional bodies can call on them for names of accounting and finance professionals from their regions. These persons usually have good memories of professional issues.

The final criterion is willingness to mentor. Some outstanding accounting and finance professionals do not know how to mentor or choose not to be involved in mentorship activities. Some are just too busy with their jobs and lives. In cases where a mentor is a staff member of the municipality, the NT recommends that mentorship activities undertaken by the mentor be included as part of the key results document. Other accounting and finance professionals have had bad mentoring experiences and do not wish to participate. Some simply do not want the responsibility. Such persons are in the minority. Most accounting and finance professionals remember the people who helped them get to where they are and are more than happy to support eager interns in their professional development. All other things being equal, it is a compliment to the professionals in the field of accounting and financial management to be asked and a privilege to share experience and insight with the intern. The interns will never know until they ask.

3. What interns can expect from their mentors

Advice: Interns can expect their mentors to offer them advice on questions or problems based on experience and insight. They should feel free to ask their mentors about previous experiences with similar problems and possible outcomes. Also ask about potential ramifications that might not occur to them.

Continuous feedback: Interns are expected to inform their mentors what happened in order to receive feedback on whether the actions they took were the best possible and suggested alternatives. This type of interaction is very valuable to interns as it tests their newly acquired skills of looking at all sides of a problem and exploring possible outcomes.

Role modelling: Interns should accompany their mentors in performing their official functions so they can see professional leadership in action. They should ask polite questions about why decisions were made or actions were taken. However, they should be aware that there might be some information that their mentors cannot share with them. They should therefore not feel offended; this behaviour is called ethics and is also behaviour worth imitating.

4. What mentors can expect from interns

Assistance: Owing to the fact that mentoring is a two-way process, the interns' side of the relationship is filled with action. One of the reasons working accounting and finance professionals may be willing to take on Municipal Financial Management Interns in a mentoring role is time management. These working professionals cannot do everything themselves, so interns who wish to be mentored should expect "to do the walk" for their mentor. They may be asked to make copies of minutes of a meeting, go to the library and look up information, get to workshop venues early and help set up and greet people. They should use each of these opportunities as a way to gain experience for the day when they are the leaders.

Code of conduct: Interns must adhere to the code of conduct as prescribed by the municipality. This includes conducting themselves professionally with their mentors and supervisors and other officials within the Municipality. Most working professionals are very busy people. Good mentors make time for what they deem core to the entire internship process. Interns must manage this element in their interaction with their mentors by making the best use of the time they have together. They should have their questions written out so that they do not waste time trying to think of them or have to call again later to get clarification. If their mentors decline to see them at a particular time, they should accept this outcome and return at an agreed time.

Loyalty: Interns must be loyal to their mentors. They may not agree with all of the ideas or plans they hear in their privileged position. Nevertheless, they must never criticise their mentor before others or work to undermine the mentors' activities. If they cannot ethically agree with what they are seeing, they should sever the mentoring relationship. That being the case, interns' actions are to be guided by their own conscience. However, interns must not remain in mentoring relationships while undermining persons from whom they are seeking the help. That would be considered unethical behaviour.

Confidentiality: Qualified professionals are bound to be leaders and are often privy to sensitive information that would not serve the best interests of the organisation to be commonly known. Such professionals and the governing bodies they serve are often given a great deal of information from which they must select the best solution. Usually information in executive sessions (from which interns will probably be excluded) and from specific governing bodies' activities is privileged. Interns may also overhear privileged information while working with their mentors. Interns will learn with time that information is a powerful tool in financial management. Therefore, interns should not be tempted to share it just to improve their own status or importance. Interns' mentors have a right to assume that they will be loyal and will keep activities confidential. Interns are encouraged to ask their mentors if there is a question about what is and is not confidential.

5. Do's and don'ts for Municipal Finance Management Interns

Municipal Finance Management Interns are expected to ask their mentors for advice if they are troubled or deeply concerned about a course of action. However, they are not expected to waste their mentors' time on trivial matters that they can figure out themselves or that are not really that important to the municipal finance management internship.

Interns can request advice if they are unable to make a decision. They should not ask for advice if the decision has already been made just to see what their mentors will say.

Interns can ask for advice and a reasonable amount of their mentor's time. However, they should not ask for money, contributions or exposure to certain areas unless their mentors suggest it first. Interns should endeavour to recognise and thank their mentors for the time and energy invested in their career development. They are not

expected to offer money. A mentoring relationship does not usually involve money. Interns should utilise every opportunity to make their mentors look good. They should not criticise or deride their mentors in front of others to make themselves look great. Interns should always treat their mentors as they would want to be treated.

In a mentoring relationship, interns will soak up knowledge, skills and experience. Interns are therefore expected to reciprocate by serving as mentors to some young aspiring finance and accounting professionals at some time in future.

To recap, interns are expected to –

- manage the relationship by establishing first contact and by continuing the relationship through e-mail, phone or personal communication;
- show a willingness to attend mentor programme events and/or to plan activities that could enhance their mentoring relationship;
- exhibit a sincere interest in developing a personal and professional relationship that supports their efforts toward completion of the municipal finance management internship and securing positions that match the skills they have acquired;
- maintain their zeal and go for it!