

Dr. Beyers Naude Local Municipality



**PERFORMANCE AGREEMENT**

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

**THE MUNICIPALITY OF DR. BEYERS NAUDE  
AS REPRESENTED BY THE MUNICIPAL MANAGER**

**Dr. E.M. Rankwana**

**AND**

**Mr. J. Joubert**

**THE EMPLOYEE OF THE MUNICIPALITY  
AS CHIEF FINANCIAL OFFICER**

**FOR THE**

**FINANCIAL YEAR: 01 JULY 2025 - 30 JUNE 2026**

Performance Agreement – Mr. J. Joubert

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N.K. [Signature]

Dr. Beyers Naudé Local Municipality

**PERFORMANCE AGREEMENT**

**ENTERED INTO BY AND BETWEEN**

The Municipality of Dr. Beyers Naude herein represented by in his capacity as Dr. E.M. Rankwana (hereinafter referred to as the Employer)

and

Mr. J. Joubert an Employee of the Dr. Beyer's Naude Municipality (hereinafter referred to as the Employee).



**WHEREBY IT IS AGREED AS FOLLOWS:**

**1. INTRODUCTION**

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

**2. PURPOSE OF THIS AGREEMENT**

- 2.1 Comply with the provisions of Section 57(1)(b),(4A) and (5) of the Systems Act as well as the Contract of Employment entered into between the parties;


  
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- 2.2 Specify objectives and targets established for the Employee and to communicate to the Employee the Employer's expectations of the Employee's performance expectations and accountabilities;
- 2.3 Specify accountabilities as set out in the Performance Plan (Annexure A);
- 2.4 Monitor and measure performance against set targeted outputs;
- 2.5 Use the Performance Agreement and Performance Plan as the basis for assessing the suitability of the Employee for permanent employment and/or to assess whether the Employee has met the performance expectations applicable to his/her job;
- 2.6 Appropriately reward the Employee in accordance with the Employer's performance management policy in the event of outstanding performance; and
- 2.7 Give effect to the Employer's commitment to a performance-orientated relationship with the Employee in attaining equitable and improved service delivery.

**3. DELIVERY**

- 3.1 This Agreement will commence on the 01 July 2025 and will remain in force until 30 June 2026, where after a new Performance Agreement, Performance Plan and if applicable a Personal Development Plan shall be concluded between the parties for the next financial year or any portion thereof.
- 3.2 The parties will review the provisions of this Agreement during June each year. The parties will conclude a new Performance Agreement and Performance Plan that replaces this Agreement at least once a year by not later than the beginning of each successive financial year.
- 3.3 This Agreement will terminate on the termination of the Employee's contract of employment for any reason.
- 3.4 The content of this Agreement may be revised at any time during the abovementioned period to determine the applicability of the matters agreed upon.
- 3.5 If at any time during the validity of this Agreement the work environment alters (whether as a result of government or council

  
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decisions or otherwise) to the extent that the contents of this Agreement are no longer appropriate, the contents shall immediately be revised.

**4. PERFORMANCE OBJECTIVES**

4.1 The Performance Plan (Annexure A) sets out –

4.1.1 The performance objectives and targets that must be met by the Employee; and

4.1.2 The time frames within which those performance objectives and targets must be met.

4.2 The performance objectives and targets reflected in Annexure A are set by the Employer in consultation with the Employee and based on the Integrated Development Plan, Service Delivery and Budget Implementation Plan (SDBIP) and the Budget of the Employer, and shall include key objectives; key performance indicators; target dates and weightings.

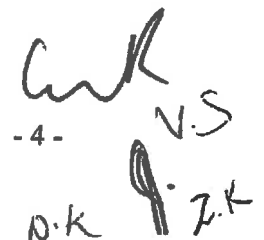
4.3 The key objectives describe the main tasks that need to be done. The key performance indicators provide the details of the evidence that must be provided to show that a key objective has been achieved. The target dates describe the timeframe in which the work must be achieved. The weightings show the relative importance of the key objectives to each other.

4.4 The Employee's performance will, in addition, be measured in terms of contributions to the goals and strategies set out in the Employer's Integrated Development Plan.

**5. PERFORMANCE MANAGEMENT SYSTEM**

5.1 The Employee agrees to participate in the performance management system that the Employer adopts or introduces for the Employer, management and municipal staff of the Employer.

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

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Dr. Beyers Naudé Local Municipality

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

**6. THE EMPLOYEE AGREES TO PARTICIPATE IN THE PERFORMANCE MANAGEMENT AND DEVELOPMENT SYSTEM THAT THE EMPLOYER ADOPTS.**

6.1 The Employee undertakes to actively focus towards the promotion and implementation of the Key Performance Areas KPA's (including special projects relevant to the employee's responsibilities) within the local government framework.

6.2 The criteria upon which the performance of the Employee shall be assessed shall consist of two components, both of which shall be contained in the Performance Agreement.

6.2.1 The Employee must be assessed against both components, with a weighting of 80:20 allocated to the Key Performance Areas (KPA's) and the Core Managerial Competencies (CMC's) respectively.

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

6.2.3 KPA's covering the main areas of work will account for 80% and CMC's will account for 20% of the final assessment.

6.3 The Employee's assessment will be based on his/her performance in terms of the outputs/outcomes (performance indicators) identified as per attached Performance Plan (Annexure A), which are linked to the KPA's, and will constitute 80% of the overall assessment result as per the weightings agreed to between the Employer and Employee:

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KEY PERFORMANCE AREAS
Organizational Transformation & Institutional Development
Service Delivery & Infrastructure Development
Local Economic Development
Financial Viability
Good Governance & Public Participation

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

CCR No	Core Competency Requirement	Weight
<b>Core Managerial Competencies</b>		
1	Strategic Capability	20
2	Programme and Project Management	
3	Financial Management	20
4	Change Management	
5	Knowledge Management	
6	Service Delivery Innovation	10
7	Problem Solving and Analytical Thinking	
8	People and Diversity Management	
9	Client Orientation and Customer Focus	10
10	Communication	
11	Accountability and Ethical Conduct	10
12	Policy Conceptualisation and implementation	10
13	Mediation skills	
14	Advanced negotiation skills	
15	Advanced influencing skills	
16	Partnership and Stakeholder Relations	
17	Supply Chain Management	20
<b>Total (Cannot exceed 100%)</b>		<b>100</b>

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**7. PERFORMANCE MANAGEMENT SYSTEM**

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 goals and strategies set out in the Employer's Integrated Development Plan (IDP).

7.5 The annual performance appraisal will involve:

7.5.1 Assessment of the achievement of results as outlined in the performance plan:

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

7.5.1.2. An indicative rating on the five-point scale should be provided for each KPA.

7.5.1.3. The applicable assessment rating calculator (refer to paragraph 7.5.3 below) must then be used to add the scores and calculate a final KPA score.

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7.5.2 Assessment of the CMC's

7.5.2.1. Each CMC should be assessed according to the extent to which the specified standards have been met.

7.5.2.2. An indicative rating on the five-point scale should be provided for each CMC.

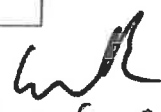
7.5.2.3. The applicable assessment rating calculator (refer to paragraph 7.5.1) must then be used to add the score and calculate a final CMC score.

7.5.3 Overall rating

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

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

Level	Terminology	Description	Rating				
			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					

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		achieved all others throughout the year.	
<b>3</b>	<b>Fully effective</b>	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 PA and Performance Plan.	
<b>2</b>	<b>Not fully effective</b>	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 performance criteria and indicators as specified in the PA and Performance Plan.	
<b>1</b>	<b>Unacceptable performance</b>	Performance does not meet the standard expected for the job. The review/assessment indicates that they employee has achieved below fully effective results against almost all of the performance criteria and indicators as specified in the PA 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.	

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- 7.7 For purposes of evaluating the performance of the Employee, an evaluation panel constituted of the following persons will be established –
- 7.7.1 Municipal Manager;
  - 7.7.2 Chairperson of the Performance Audit Committee or the Audit Committee in the absence of a performance audit committee;
  - 7.7.3 Member of the Mayoral Committee or Executive committee or in respect of a plenary type municipality, another member of council; and
  - 7.7.4 Municipal Manager from another Municipality.

**8. SCHEDULE FOR PERFORMANCE REVIEWS**

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

Quarter	Review Period	Review to be completed by
1	July – September 2025	31 <sup>st</sup> October 2025
2	October – December 2025	30 <sup>th</sup> January 2026
3	January - March 2026	30 <sup>th</sup> April 2026
4	April - June 2026	31 <sup>st</sup> July 2026

- 8.2 The Employer shall keep a record of the mid-year review and annual assessment meetings.
- 8.3 Performance feedback shall be based on the Employer's assessment of the Employee's performance.
- 8.4 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.
- 8.5 The Employer may amend the provisions of Annexure A whenever the performance management system is adopted, implemented

  
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and/or amended as the case may be. In that case, the Employee will be fully consulted before any such change is made.

## **9. DEVELOPMENTAL REQUIREMENTS**

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

## **10. OBLIGATIONS OF THE EMPLOYER**

10.1 The Employer shall-

10.1.1 Create an enabling environment to facilitate effective performance by the employee;

10.1.2 Provide access to skills development and capacity building opportunities;

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

10.1.4 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

10.1.5 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.

## **11. CONSULTATION**

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

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

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

11.1.3 A substantial financial effect on the Employer.

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

**12. MANAGEMENT OF EVALUATION OUTCOMES**

12.1 The evaluation of the Employee's performance will form the basis for rewarding outstanding performance or correcting unacceptable performance.

12.2 The employee must achieve 50% of his or her duties. Failure to do that, the Municipal Manager may institute disciplinary hearings against the employee

12.3 A performance bonus ranging between 5% to 14% of the Employees inclusive annual remuneration package may be paid to the Employee in recognition of outstanding performance, upon Council's approval.

12.4 The Employee will be eligible for progression to the next higher remuneration package, within the relevant remuneration band, after completion of at least twelve months (12) service at the current remuneration package, subject to a fully effective assessment.

12.5 In the case of unacceptable performance, the Employer shall –

12.5.1 Provide systematic remedial or developmental support to assist the Employee to improve his or her performance; and

12.5.2 After appropriate performance counselling and having provided the necessary guidance and/or support as well as reasonable time for improvement in performance, the Employer may consider steps to terminate the contract of employment of the Employee on grounds of unfitness or incapacity to carry out his or her duties.

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**13. DISPUTE RESOLUTION**

- 13.1 Any disputes about the nature of the Employee's performance agreement, whether it relates to key responsibilities, priorities, methods of assessment and/or any other matter provided for, shall be mediated by –

In the case of 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 to both parties.

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

In the case 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), within thirty(30) days of receipt of a formal dispute from the employee;

Whose decision shall be final and binding to both parties

**14. GENERAL**

- 14.1 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.
- 14.2 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.



**PERFORMANCE PLAN**

**Entered into by and between**

**THE MUNICIPALITY OF DR. BEYERS NAUDE  
AS REPRESENTED BY THE MUNICIPAL MANAGER**

**DR.E.M. RANKWANA**

**AND**

**MR. J. JOUBERT**

**THE EMPLOYEE OF THE MUNICIPALITY  
AS CHIEF FINANCIAL OFFICER  
FOR THE PERIOD: 01 JULY 2025 – 30 JUNE 2026**

**Performance Plan – Chief Financial Officer – Mr. J. Joubert**

### 1. PURPOSE

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

### 2. KEY RESPONSIBILITIES

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

1. Sound Financial Management
2. Back to Basics - Good Governance
3. Organizational Transformation & Institutional Development

### 3. KEY PERFORMANCE AREAS

The following Key Performance Areas (KPA's) as, outlined in the Local Government: Municipal Planning and Performance Management Regulations (2006) and set in consultation with the employee, inform the strategic objectives listed in the table below:

KEY PERFORMANCE AREAS
Infrastructure Planning & Service Delivery
Community Development
Organizational Transformation & Institutional Development
Back to Basics – Sound Financial Management

**4. KEY PERFORMANCE INDICATORS**

The following Key Performance Indicators (KPIs) provide the details of the evidence that must be provided to show that a key objective has been obtained. The target dates describe the timeframe in which the work must be achieved. The weightings show the relative importance of the key objectives to each other

- **SERVICE DELIVERY TARGETS AND PERFORMANCE INDICATORS**

PERFORMANCE PLAN - CHIEF FINANCIAL OFFICER 2025/2026										
Object	Strategy	KPI	Weight %	Proof	Annual Target	Performance Milestones				
						Quarter 1	Quarter 2	Quarter 3	Quarter 4	
<b>INSTITUTIONAL DEVELOPMENT</b>										
To provide sufficient operational requirements, furnish and equip the relevant offices and venues, in order to improve efficiency of all departments, their staff and the Municipality's levels of service delivery, as well as be legally compliant.	Implement Plan & Policies and upgrade systems accordingly; provide suitable training to enable staff to utilize these systems optimally and correctly.	Number of municipal policies reviewed 30 <sup>th</sup> June 2026.	10	Council Minutes	12	n/a	n/a	6 Financial policies reviewed.	6 Financial policies reviewed and approved by council.	1= more than 6 2 = more than 10 3= 12 4 = 15 and more including new policies developed 5 = 20 and more including new policies developed

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To provide sufficient operational requirements, furnish and equip the relevant offices and venues, in order to improve efficiency of all departments, their staff and the Municipality's levels of service delivery, as well as be legally compliant.	Implement Plan & Policies and upgrade systems accordingly; provide suitable training to enable staff to utilize these systems optimally and correctly.	Number of Expenditure reduction strategies approved by the Municipal Manager by 31 March 2026	10	Cost containment plan	1	N/A	N/A	Expenditure reduction plan approved	N/A	1 = Draft ERP 2 = Draft ERP Workshop 3 = ERP Approved before 31 March 2026 and implementation of 50% of activities 4 = ERP approved before 31 March 2026 and implementation of 80% of activities 5 = ERP approved before 31 March 2026 and implementation of 80% of activities
<b>SOUND FINANCIAL MANAGEMENT</b>										
To become a financially viable and sustainable Municipality.	The development and implementation of a Funding Strategy.	Number of applicants registered on the mymunic app under the electricity immunity project by 30 <sup>th</sup> June 2026	10	Report with listing of Businesses	8	2 business applications registered	2 business applications registered	2 business applications registered	2 business applications registered	1 = 1-3 application registered 2 = 4-7 applications registered 3 = 8 applications registered 4 = 9 and more applications registered 5 = 12 and more applications registered
To become a financially viable and sustainable Municipality.	The development and implementation of a Funding Strategy.	90% expenditure of Municipal FMG Grant by 30 <sup>th</sup> June 2026.	10	s71 reports and AFS	90%	15%	30%	70%	90%	1 = 30% 2 = 70% 3 = 90% 4 = 95% and more 5 = 100%

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To receive a Clean Audit Opinion from the Auditor-General.	Implementation and execution of an Audit Action Plan.	Reduction of irregular, fruitless & wasteful expenditure by 30th June 2025	10		Council resolution	10%	N/A	Submit UJF&W to MPAC for investigation	Submit UJF&W to MPAC for investigation	Table investigated UJF&W to council for consideration.	1= 3% reduction 2= 5% reduction 3=10% reduction 4=25% reduction and more 5= 50% reduction and more
To receive a Clean Audit Opinion from the Auditor-General.	Implementation and execution of an Audit Action Plan.	Number of AFS submitted to the AG by 31 August	10		Submission receipt	1	N/A	Submit AFS to the Office of the Auditor General South Africa	N/A	N/A	1 = Draft AFS by 31 August 2= Internal audit reviewed AFS by 31 August 3= Submitted AFS to AG by 31 August 4= Submitted AFS to AG before 31 August 5= AFS Reviewed by Internal Audit and Audit Committee and submitted to AG before 31 August
To receive a Clean Audit Opinion from the Auditor-General.	Implementation and execution of an Audit Action Plan.	Improve Outcome of the AG report by developing and audit action plan to address previous findings by 30 June 2026.	10		Audit implementation on action plan	1	n/a	Audit Action plan developed	N/A	N/A	1= Draft Audit Action Plan 2= Draft Audit Action plan workshop 3= Approved Audit Action Plan 4= Approved Audit Action plan with 50% findings addressed 5= Approved Audit Action plan with 80% findings addressed.
To receive a Clean Audit Opinion from the Auditor-General.	Implementation and execution of an Audit Action Plan.	Verification of the completeness of the Asset Register (Asset Register compliant to	5		Asset register	100%	All purchases captured and updated on Asset Register	All purchases captured and updated on Asset Register and Follow up	All purchases captured and updated on Asset Register and address	All purchases captured and updated on Asset Register and conduct	1 = 50% purchases captured on asset register 2= 80% purchases captured on asset

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General.		GRAP standards)					on queries of Auditor General	audit outcomes	an annual review of the condition and useful life of assets.	register 3= 100% purchases captured on asset register 4= 100% purchases captured on asset register and 80% audit findings addressed 5= 100% purchases captured on asset register and 100% audit findings addressed.
To adopt a realistic, credible and funded Annual Budget	Alignment of the Budget to the IDP's Development Priorities.	2026//2027 Budget approved by Council by 30 June 2026.	10	Approved Budget and Council minutes	1	Process Plan adopted	Budget priorities developed	Draft budget by 30 March 2026.	Approved by Council on the 30 June 2026.	1= draft budget 2= draft budget workshop 3=adopted budget by 30 <sup>th</sup> June 4= adopted funded budget and public hearings by 30 <sup>th</sup> June 5= adopted funded budget and public hearing before 31 March
To become financially viable and sustainable Municipality	The development and implementation of a funding strategy.	Number of reports on the implementation of the Budget Funding Plan by 30 June 2026.	5	Minutes Progress reports	4	Ensure compliance with Budget Funding Plan deadlines by submitting implementation progress reports to the Municipal Manager and EXCO	Ensure compliance with Budget Funding Plan deadlines by submitting implementation progress reports to the Municipal Manager and EXCO	Ensure compliance with Budget Funding Plan deadlines by submitting implementation progress reports to the Municipal Manager and EXCO	Ensure compliance with Budget Funding Plan deadlines by submitting implementation progress reports to the Municipal Manager and EXCO	1= 30% compliance with budget funding plan 2= 50% compliance with budget funding plan 3=100% compliance with budget funding plan 4= 100% compliance with budget funding plan and quarterly reports to EXCO

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To become a financially viable and sustainable Municipality.	Implementation and execution of the Financial Recovery Plan – robust plans for the repayment of debt and/or maintain a healthy level of cash reserves and assets in order to meet unexpected costs.	10	S71 reports	95%	60%	70%	80%	95%	5= 100% compliance with budget funding plan, quarterly reports to EXCO and monthly reports to the Accounting Officer 1= 60% 2=80% 3= 95% 4= 100% 5= 100% collection rate and improved cashflow
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CCR No	Core Competency Requirement	Weight
<b>Core Managerial Competencies</b>		
1	Strategic Capability	20
2	Programme and Project Management	
3	Financial Management	20
4	Change Management	
5	Knowledge Management	
6	Service Delivery Innovation	10
7	Problem Solving and Analytical Thinking	
8	People and Diversity Management	
9	Client Orientation and Customer Focus	10
10	Communication	
11	Accountability and Ethical Conduct	10
12	Policy Conceptualisation and implementation	10
13	Mediation skills	
14	Advanced negotiation skills	
15	Advanced influencing skills	
16	Partnership and Stakeholder Relations	
17	Supply Chain Management	20
<b>Total (Cannot exceed 100%)</b>		<b>100</b>

**Signed and accepted by the Chief Financial Officer**

  
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**Signed by the Municipal Manager**

  
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**PRO FORMA  
PERSONAL DEVELOPMENT PLAN (PDP)**

**Entered into by and between**

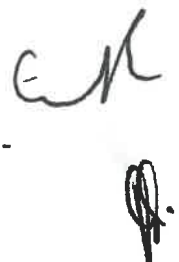
**THE DR. BEYERS NAUDE MUNICIPALITY  
AS REPRESENTED BY THE MUNICIPAL MANAGER**

**DR. E.M. RANKWANA  
[THE EMPLOYER]**

**AND**

**MR. J. JOUBERT  
AS CHIEF FINANCIAL OFFICER  
[THE EMPLOYEE]**

**PERIOD: 01 JULY 2025 – 30 JUNE 2026**



## **1 PERSONAL DEVELOPMENT PLAN**

### **1.1.1 A Municipality should be committed to:**

- (a) the continuous training and development of its employees to achieve its vision, mission and strategic objectives and empower employees and
- (b) Managing training and development within the ambit of relevant national policies and legislation.

### **1.1.2 A Municipality should follow an integrated approach to Human Resource Management, that is:**

- (a) Human resource development forms an integral part of human resource planning and management.
- (b) In order for training and development strategy and plans to be successful it should be based on sound Human Resource (HR) practices, such as the (strategic) HR Plan, job descriptions, the result of regular performance appraisals and career-pathing.
- (c) To ensure the necessary linkage with performance management, the Performance Management and Development System provides for the Personal Development Plans of employees to be included in their annual performance agreements. Such approach will also ensure the alignment of individual performance objectives to the municipality's strategic objectives, and that training and development needs can be identified through performance management and appraisal.
- (d) Career-pathing ensures that employees are placed and developed in jobs according to aptitude and identified potential. Through training and development they can acquire the necessary competencies to prepare them for future positions. A comprehensive competency framework and profile for Municipal Managers are attached and these should be linked to relevant registered unit standards to specifically assist them in compiling Personal Development Plans in consultation with their managers.
- (e) Personal Development Plans are compiled for individual employees and the data collated from all employees in the municipality forms the basis for the prescribed Workplace Skills Plan, which municipalities are required to compile as a basis for all training and education activities in the municipality in a specific financial year and report on progress

made to the Local Government Sector Education and Training Authority.

**1.1.3 The aim of the compilation of Personal Development Plans is to identify, prioritise and implement training needs.**

**1.1.4 Compiling the Personal Development Plan attached at Appendix.**

(a) Competency assessment instruments, which are dealt with more specifically in Appendix 1 and 2, should be established to assist with the objective assessment of employees' actual competencies against their job specific competency profiles and managerial competencies at a given period in time with the purpose of identifying training needs or skills gaps.

(b) The competency framework and profiles and relevant competency assessment results will enable a manager, in consultation with his/her employee, to compile a Personal Development Plan. The identified training needs should be entered into column 1 of Appendix 1, entitled Skills/Performance Gap. The following should be carefully determined during such a process:

**i. Organisational needs, which include the following:**

- Strategic development priorities and competency requirements, in line with the municipality's strategic objectives.
- The competency requirements of individual jobs. The relevant job requirements (job competency profile) as identified in the job description should be compared to the current competency profile of the employee to determine the individual's competency gaps.
- Specific competency gaps as identified during the probation period find performance appraisal of the employee.

**ii. Individual training needs that are job/career related.**

(c) Next, the prioritisation of the training needs [1 to...] should be listed since it may not be possible to address all identified training needs in a specific financial year. It is however of critical importance that training needs be addressed on a phased and priority basis. This implies that all these needs should be prioritized for purposes of accommodating critical/strategic training and development needs in the HR Plan, Personal Development Plans and Workplace Skills Plan.

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

APPENDIX 1

Personal Development Plan of: Mr. J. Joubert

1. Skills Performance Gap (in order of priority)	2. Outcomes Expected (measurable indicators: quantity, quality and time frames)	3. Suggested training and /or development activity	4. Suggested mode of delivery	5. Suggested Time Frames	6. Work opportunity created to practice skill/development area	7. Support Person
E.g. 1. Appraise Performance of Managers	The Manager will be able to enter into performance agreements with all managers reporting to him / her, appraise them against set criteria, within relevant time frames.	A course containing theoretical and practical application with coaching in the workplace following [relevant unit standard?].	External provider, in line with identified unit standard and not exceeding R6000.	March 2026...	Appraisal of managers reporting to him / her.	Senior Manager: Training.
2.						
3.						
4.						
5						



**Signed and accepted by the Employee (Chief Financial Officer)**

  
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**Signed by the Municipal Manager on behalf of the Municipality.**

  
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