

IDP PROCESS PLAN 2022-2027

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VISION & MISSION

Garden Route, the leading, enabling and inclusive district, characterised by equitable and sustainable development, high quality of life and equal opportunities for all.

Mission

The Garden Route District Municipality, as a category C local authority, strives to deliver on its mandate through:

- Unlocking resources for equitable, prosperous and sustainable development.
- Provide the platform for coordination of bulk infrastructure planning across the district.
- Provide strategic leadership towards inclusive / radical / rigorous socio-economic transformation, to address social, economic and spatial injustice.
- Redress inequalities, access to ensure inclusive services, information and opportunities for all citizens of the district.
- Initiate funding mobilisation initiatives / programmes, to ensure financial sustainability.
- Coordinate and facilitate social development initiatives.

STRATEGIC OBJECTIVES

- Strategic Objective 1 *A Skilled Workforce and Communities*
- Strategic Objective 2 *Bulk Infrastructure Co-ordination*
- Strategic Objective 3 *Financial Viability.*
- Strategic Objective 4 *Good Governance.*
- Strategic Objective 5 *Growing an inclusive district economy.*
- Strategic Objective 6 *Healthy and socially stable communities*
- Strategic Objective 7 *Sustainable Environmental Management and
Public Safety.*

VALUES



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SECTION ONE

INTRODUCTION AND BACKGROUND

1. INTRODUCTION AND BACKGROUND

The Process plan is an organized activity plan that outlines the process of development of the IDP/Budget and Performance. This process plan outlines the manner in which the 2022-2027 IDP development and Budget process will be undertaken. It has been prepared in line with the 2022-2027 District Framework Plan.

Section 153 of the Constitution of the Republic of South Africa provides that a municipality must “structure and manage its administration and planning processes to give priority to the basic needs of the community and to promote the social and economic development of the community”. This constitutional provision illustrates the need for integrating the planning, budgeting, implementation and reporting processes of all public institutions.

The IDP of a municipality is developed for a five year period and is reviewed annually. Section 25 of the Municipal Systems Act, No 32 of 2000 states that: “Each municipal council must, within a prescribed period after the start of its elected term, adopt a single, inclusive and strategic plan for the development of the municipality.

The IDP, as a municipality's strategic plan, informs Municipal decision-making as well as all the business processes of the Municipality. The IDP must inform the Municipality's financial and institutional planning and most importantly, the drafting of the annual budget.

This plan includes the following:

- A programme specifying the time frames for the different planning steps;
- Appropriate mechanisms, processes and procedures for consultation and participation of local communities, organs of state, traditional authorities, and other role players in the IDP drafting process;
- Clear roles and responsibilities for all
- An indication of the organisational arrangements for the IDP process;
- Binding plans and planning requirements, i.e. policy and legislation; and

1.1. Legal context

Section 25 (1) of the Municipal Systems Act (32 of 2000) indicates that: "Each Municipal Council must, within prescribed period after the start of its elected term, adopt a single, all-inclusive and strategic plan for the development of the municipality which:

- 1) Links, integrates and coordinates plans and takes into account proposals for the development of the community;
- 2) Aligns the resources and capacity of the municipality with the implementation of the plan;
- 3) Complies with the provisions of this Chapter (Chapter 5 MSA); and
- 4) Is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation".

In terms of Section 28 and 29 of the Municipal Systems Act (2000)

Section 28 : Adoption of process

(1) Each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan.

(2) The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, consult the local community before adopting the process.

(3) A municipality must give notice to the local community of particulars of the process it intends to follow.

Section 29: Process to be followed

(1) The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must-

(a) be in accordance with a predetermined programme specifying timeframes for the different steps;

(b) through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for-

- (i) the local community to be consulted on its development needs and priorities;

- (ii) the local community to participate in the drafting of the integrated development plan; and
 - (iii) organs of state, including traditional authorities, and other role-players to be identified and consulted on the drafting of the integrated development plan.
- (c) provide for the identification of all plans and planning requirements binding on the municipality in terms of national and provincial legislation; and
- (d) be consistent with any other matters that may be prescribed by regulation.

(2) A district municipality must-

- (a) plan integrated development for the area of the district municipality as a whole but in close consultation with the local municipalities in that area;
- (b) align its integrated development plan with the framework adopted in terms of Section 27; and
- (c) draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the local municipalities in that area.

3) A local municipality must-

- (a) align its integrated development plan with the framework adopted in terms of Section 27; and
- (b) draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the district municipality.

The preparation and adoption of a Process Plan is provided for under **Section 28 of the Municipal Systems Act, No 32 of 2000**, which states:

Each municipal council must, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan".

The **Municipal Finance Management Act, No 56 of 2003 (MFMA)** is very clear with respect to time-frames for the IDP and the budget.

Section (21) and (24) of the MFMA requires the budget and IDP schedule (or Process Plan) to be adopted by Council by the end of August, the draft budget and IDP to be tabled before the council in March and final budget and IDP to be adopted by council in May each year.

1.2. DISTINCTION BETWEEN PROCESS PLAN AND TIME SCHEDULE

Process Plan (Five Year)	Time Schedule (annually)
The IDP Process Plan in accordance with Section 28 of the MSA is a process set out in writing to guide the planning, drafting, adoption and review of its initial 5-year IDP after the start of Councils elected term. It contains events to be undertaken in the process of developing the actual IDP and supporting IDP processes of the Local municipalities to ensure alignment	In accordance with Section 21 of the MFMA the Council must adopt a time schedule outlining key deadlines for the tabling and adoption of the annual review/amendment of the IDP, any amendments to the IDP and consultative processes which form part of the Annual IDP and Budget review.

SECTION TWO ROLES AND RESPONSIBILITIES

2.1. Role and Responsibilities

Role Player	Roles and Responsibilities
Council	<ul style="list-style-type: none">• Adoption of a District Framework and Process Plan.• Ensure the amendment of the IDP under changing circumstances.
Executive Mayor	<ul style="list-style-type: none">• General management of the drafting of the IDP• Assign responsibilities in this regard to the Municipal Manager and Portfolio Committees.• Recommend the draft IDP and Budget to the Council
Municipal Manager	<ul style="list-style-type: none">• Decide on planning process;• Develop and compile a draft IDP/SDF• Monitor the process of IDP/SDF Review;• Overall Management and co-ordination;• Provide the necessary resources for the compilation and implementation of the IDP/SDF.

HOD's	<ul style="list-style-type: none"> • Provide technical/ sector expertise • Identify strategic gaps in the existing plans, and advise accordingly • Prepare and review selected Sector Plans. • Prepare draft progress reports and proposals.
Manager: Integrated Development Planning	<ul style="list-style-type: none"> • Day-to-day management of the process • Assist and support the Municipal Manager in the development of the IDP • Facilitate the sitting of the IDP Steering Committee and Rep Forum • Ensure that phases of the IDP are fully implemented and reported accordingly. • Oversee the alignment of the planning process internally and with those of the local municipal areas.

2.2. ORGANIZATIONAL ARRANGEMENTS

The GDRM will employ the following structures and platforms to ensure continued liaison and coordination throughout the IDP process:

- IDP/Budget/PMS Representative Forum
- District IDP Managers FORUM
- District Coordinating Forum
- Municipal Managers Forum
- JDMA Task Team (One Plan/JDMA Implementation Plan)
- SIME
- All GRDM IGR Forums
- WC District Integrated Forum
- Provincial IDP Managers Forum
- Working Groups to implement the Growth and Development Strategy for each strategic priority

IDP/Budget/PMS Representative Forum

The IDP/Budget/PMS Representative Forum, formed as part of the IDP development process, will continue to function throughout the IDP development. Should

circumstances warrant, their terms of reference or representation may be extended to suit changed circumstances or shortcomings identified during the IDP process. The Representative Forum is comprised of GRDM Councillors and Senior Management; Local Municipalities' Mayors and Senior Management; representatives from sector departments, parastatal bodies, NGOs, business fraternity, traditional leaders, and other interested organized bodies. This forum is chaired by the Executive Mayor of the District.

Technical IDP/Budget/PMS Steering Committee

The IDP/budget/PMS Steering Committee, form part of the IDP development process, will continue to function throughout the IDP development. Should circumstances warrant, their terms of reference or representation may be extended to suit changed circumstances or shortcomings identified during the IDP process. This committee will monitor progress of the development of the IDP Review document. Of critical importance is that it will be the structure that “puts it all together”. This is important because there are a number of sub-activities that form part of the IDP development, each of which will require a specific focus.

Municipal Managers Forum (MMF)

This forum is chaired by the District Municipal Manager, all Municipal Managers within the district, meet quarterly to ensure alignment of the district plans, to ensure proper coordination and avoid duplication of planning and services. The District Municipality at the centre of this will always provide leadership in ensuring that there is no unnecessary competition and uncoordinated planning within the district.

District Coordinating Forum (DCF)

In the development of the IDP, Mayors and Municipal Managers of all municipalities falling within the Garden Route District meet quarterly to ensure co-ordination and alignment between local and district municipalities' IDPs. Provincial Government Department representatives will form part of the DCF meetings to ensure that there is an alignment between the District IDP and the Provincial policies and budgets. This forum is chaired by the District Executive Mayor.

Joint District and Metro Approach Task Team (One Plan/JDMA Implementation Plan)

During Presidential Budget Speech 2019, the President directed the sixth administration to develop and implement a new integrated district based approach (DDM) to address service delivery challenges. In response, the Western Cape Premier's Coordinating Forum (PCF) endorsed the Joint District and Metro Approach (JDMA), a geographical and team based, citizen focused approach to provide government services with an outcome of improving the living conditions of citizens. To achieve the goals of developmental local government a strong working relationship between politician's administration and citizens is imperative.

Provincial IDP Managers Forum

All IDP Managers and sector departments of the province meet quarterly to share best practices and to ensure effective implementation of Integrated Development Planning in the province.

Internal structures to ensure development planning, budgeting and implementation monitoring are as follows:

- Council
- Mayco
- Section 79 Committees
 - Governance Committee;
 - Municipal Public Accounts Committee (MPAC);
 - Training and Development Committee;
 - Occupational Health & Safety
- Section 80 Committees
 - Roads & Transport Planning Services;
 - Financial Services;
 - Community Services;
 - Planning, Property Management and Development;
 - District Economic Development and Tourism;
 - Corporate Services; and
 - Strategic services
- Budget Steering Committee
- Technical IDP Budget & PMS Steering Committee

SECTION THREE

IDP PLANNING PROCESS

3.1. Legislative Overview of the IDP Planning Process

3.1.1 Chapter 5 and Section 25(1) of the Municipal Systems Act (2000)

(1) Each municipal council must, within a prescribed period after the start of its elected term, adopt a single, inclusive and strategic plan for the development of the municipality which-

(a) links, integrates and co-ordinates plans and takes into account proposals for the

Development of the municipality;

(b) aligns the resources and capacity of the municipality with the implementation of the plan;

(c) forms the policy framework and general basis on which annual budgets must be based;

(d) complies with the provisions of this Chapter; and

(e) is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation.

3.1.2 Section 26 of the Municipal Systems Act (2000): Core components of Integrated Development Plan

An integrated development plan must reflect-

(a) the municipal council's vision for the long-term development of the municipality with special emphasis on the municipality's most critical development and internal transformation needs;

(b) an assessment of the existing level of development in the municipality, which must

include an identification of communities which do not have access to basic municipal services;

(c) the council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;

(d) the council's development strategies which must be aligned with any national or provincial sectoral plans and planning requirements binding on the municipality in terms of legislation;

(e) a spatial development framework which must include the provision of basic guidelines for a land use management system for the municipality;

((f) the council's operational strategies;

(g) applicable disaster management plans;

(h) a financial plan, which must include a budget projection for at least the next three years; and

(i) the key performance indicators and performance targets determined in terms of section 41

3.2 IDP Review Process

The Municipal Systems Act 32 of 2000, in Section 34 outlines legislative prescripts in respect of the annual review and amendment of integrated development plan.

A municipal council:

(a) must review its integrated development plan:

(i) annually in accordance with an assessment of its performance measurements in terms of section 41; and

(ii) to the extent that changing circumstances so demand;

(iii) may amend its IDP in accordance with a prescribed process.

3.2.1 Purpose of a review

For the IDP to remain relevant the municipality must assess implementation performance and the achievement of its targets and strategic objectives. In the light of this assessment the IDP is reviewed to reflect the impact of successes as well as corrective measures to address problems. The IDP is also reviewed in the light of

changing internal and external circumstances that impact on the priority issues, outcomes and outputs of the IDP.

The IDP has to be reviewed annually in order to:

- Ensure its relevance as the municipality's strategic plan;
- Inform other components of the municipal business process including institutional and financial planning and budgeting; and
- Inform the cyclical inter-governmental planning and budgeting cycle.

The annual review must inform the municipality's financial and institutional planning, and the drafting of the annual budget. It must be completed in time to properly inform the latter

3.2.3 Amendment of the IDP

In terms of Section 34(b) of the MSA, a municipal council may amend its IDP in accordance with the prescribed process. The need to amend the IDP could arise from the 2 different scenarios:

- (a) The annual performance review; or
- (b) Changing circumstances.

Based on the findings of the annual performance review of the IDP, the Municipality may decide to amend its IDP. The following factors within the annual performance review may be evaluated when considering to amend the IDP:

- Whether the aims and objectives of the IDP are reached by the Municipality;
- Whether the direction provided within the IDP is incorporated within the sectoral plans; and
- Whether the Municipal budget being spent is in line with the planned expenditure.

Changing circumstances can be regarded as general circumstances that are out of the control of the Municipality that have a substantive impact on the Municipality's policies and/or plans and could include:

- Changes in legislation, policy, norms or standards
- Disaster (e.g. drought, pandemics, etc
- Thresholds being reached in terms of certain parameters (e.g. air quality standard, water quality standard, water supply level, etc.);
- Significant proposal for development in the municipal area that will result in significantly changed human settlement needs, socio-economic needs or

altered natural environments;

- Drastic change in population growth;
- Change in political leadership resulting in the change of priorities; and
- New information that gives rise to the need for new or additional or changed policies, programmes and projects or adapted proposals.

3.3. IDP PLANNING CYCLE FOR DEVELOPMENT OF 5 YEAR IDP

<p style="text-align: center;">Phase 1 : Analysis</p> <p>(a) Legal Framework Analysis</p> <p>(b) Leadership Guidelines</p> <p>(c) Municipality Technical Development Analysis</p> <p>(d) Community and Stakeholder Development Analysis</p> <p>(e) Institutional Analysis</p> <p>(f) Economic Analysis</p> <p>(g) Socio-Economic Analysis</p> <p>(h) Spatial Analysis</p> <p>(i) Environmental Analysis</p> <p>(j) In-depth Analysis and identification of Key Development Priorities</p>
<p style="text-align: center;">Phase 2 : Strategies</p> <p>(a) Identifying a Vision, Mission and Value System (b) Perform a Gap Analysis</p> <p>(c) Identify Key Performance Areas (KPA's)</p> <p>(d) Determine Strategies and Development Objectives</p> <p>(e) Link KPA's and Objectives to Sectoral Functions</p>
<p style="text-align: center;">Phase 3: Projects</p> <p>(a) Performance Management System</p> <p>(b) Identify Capital Projects</p> <p>(c) Identify Specific Programmes</p> <p>(d) Compile Five Year Operational Business Plan</p>
<p style="text-align: center;">Phase 4: Integration</p> <p>(a) Integration of Processes</p> <p>(b) Institutional Restructuring and Alignment</p> <p>(c) Compile an Integrated Communication Plan</p>

Phase 5: Approval	
(a) District Alignment (b) Public Comments (c) Provincial/National Alignment (d) Final Approval by the Municipal Council	
ANNUAL IMPLEMENTATION	
(a) Compiling Operational Business Plans (b) Compiling Municipal Budget (c) Monitor, Evaluate and Review Reporting	

3.4 GARDEN ROUTE DISTRICT MUNICIPALITY IDP PROCESS TIME FRAME

Phase	Activities	Timeframe
Initiation	Adoption of IDP Time Schedule and Revised IDP Time Schedule Adoption of District Framework and Process Plan	August 2021 January 2022 Completed by April 2022
Analysis	Community and Ward Committee meetings Stakeholder meetings	Completed by February 2022
Strategies	Strategic workshops	Completed by April 2022
Project	Municipality-wide Projects/Programmes Community Level Projects/Programmes	December – February 2022
Integration	District and B – municipalities to integrate all municipal sector plans integration	Completed by March 2022
Council consideration	District and B – Municipal Councils to consider Draft IDP	Completed by 31 March 2022
Public Participation	Communities to comment on IDPs	Completed by 30 April 2022
Council adoption	Final approval by District and B – Municipal Councils	Completed by 31 May 2022

SECTION FOUR

PUBLIC PARTICIPATION: IDP PROCESS

4.1. PUBLIC PARTICIPATION

The Municipal Systems Act (2000), Chapter 4 encourages community participation in the affairs of the municipality. Further one of the main features of the integrated development planning is the involvement of community and stakeholder organizations in the process of developing the IDPs. Participation of affected and interested parties is very important to ensure that the IDP addresses the real issues that are experienced by the citizens of a municipality.

The District Municipality will, at the start of the IDP review process, place a blanket notice on the local newspapers inviting interested parties to participate in the representative forums of all municipalities within the Garden Route District.

4.2. MECHANISMS FOR PUBLIC PARTICIPATION

The following mechanisms will be used for public participation within the District:

- **IDP/Budget/PMS Representative Forum**

The Forum will represent all stakeholders and will be inclusive as possible, additional organizations will be encouraged to participate in the forum throughout the process.

- **Media**

Amongst other means:

- The Local press will be used to inform the community of the progress with respect to the IDP Reviews
- Radio broadcasts covering the area of the municipality
- Municipal notice boards, including; libraries, satellite offices, municipal websites, etc.

- **Imbizo and Forums**

These will be broad based and will target members of the community at a greater scale in LMs.

- **The District Website, YouTube and Facebook pages**

The Districts website and Facebook page will be utilised to communicate and inform the community. Copies of the IDP and Budget will be placed on the website for communities and service providers to download.

- **District Road show**

GRDM to embark on Road shows as part of the IDP Process, to share information and to obtain community concerns.

4.3. MONITORING AND AMENDMENTS

It is very critical that the monitoring and review mechanisms be catered for in the planning process. The following with regards to monitoring and amendment of the IDP and Budget Process Plan is recommended:

- The Municipal Manager and/or delegated official co-ordinate and monitor the IDP development process;
- Progress to be reported to the Executive Mayor, and any deviations from the Process Plan must be highlighted;
- The Executive Mayor may be advised to make amendments to the Process Plan should these be required. An example of this would be revisiting time frames in the event of unforeseen delays

SECTION FIVE

MECHANISMS AND PROCEDURES FOR ALIGNMENT

5.1. MECHANISMS AND PROCEDURES FOR ALIGNMENT

The IDP planning process is a local process, which requires the input and support from other spheres of government at different stages. Alignment is the instrument to synthesize and integrate the top-down and bottom-up planning process between different spheres of government.

Mechanisms and procedures for vertical and horizontal alignment have been discussed under Section 2- Organizational Arrangements (IDP Forum, MMF and DCF), however, it is important to note that the planning processes need to be coordinated and addressed jointly. The District Municipality must ensure that alignment between local municipalities takes place, and the WC Department of Local Government should play a coordinating role in ensuring that all other spheres and especially sector departments understand the need for alignment and their role within the local and District IDP processes.

IDP Phase	Time	Alignment Activity	Roleplayers
Preparation	July-August	District Alignment Working Session	Officials from IDP, Budget and PMS from all municipalities and DLG
		MMF	District, DLG, B municipalities
		IDP & Public Participation Managers	District, DLG, B municipalities
		IDP Budget & PMS Steering Committee Meeting	District Management Team
Analysis	September - November	IDP Rep Forum Ward Committee Meetings	All municipalities Sector Departments
Strategies	October-	Strategic Workshops	Council

	November		GRDM Administration
Projects	November- December	MMF IDP & Public Participation Meeting Technical IDP Budget and Performance Committee Meeting	DLG, District, B municipalities District Management Team
Integration	December- April	IDP Rep Forum LG MTECH/TIME	District Sector Departments
Approval	March- May	SIME Council Meeting	District, DLG, Sector Departments Council



5.1.1. Role-players:

While the IDP process is a local government process, it also requires substantial input and support from other spheres of Government i.e. National and Provincial departments (as well as the private sector, parastatal bodies, NGOs, CBOs and the community at large). Accordingly, there needs to be alignment with these role-players. In principle, the roles of the various spheres of government in the IDP Review process are anticipated to be as follows:

National Linkages:

The national sphere of Government should at least provide a framework for the preparation of the Sector Plans, and where possible funding for such plans. The national sphere should also coordinate and prioritise programmes and budgets between sectors and the national sphere in line with the framework.

Alignment of the Joint District and Metro Approach and the Integrated Development Planning

As part of the process of strengthening sector participation in the development of the District IDPs, national and provincial sector departments will be expected to share their current and future projects and programmes for the Garden Route Region. Further sector departments will be expected to participate in the IDPs processes of the District. The strategic planning sessions of municipalities will be utilized as one of the key platforms to enable the participation of the external stakeholders to contribute to the development of the IDPs.

Provincial Level:

As with the National Government, the Provincial Government should prepare Sectoral Guidelines and funding for the preparation of Sector Plans. This will contribute to the creation of a normative framework and consistency between municipalities. The development of the Sector Plans programmes needs to be coordinated, aligned and cascaded down to local level.

This can be facilitated at the provincial level through the Office of the Premier.

Western Cape Provincial Strategic Plan (2019-2024)

The PSP, a bold policy agenda and implementation plan gives expression to our strong view that progress must be built on a “whole-of-society” approach in which citizens, civil society and business actively partner with the state – encapsulated in the Western Cape Government’s “Better Together” slogan.

This Provincial Strategic Plan details how, over the next five years, we will: 1) build safe and cohesive communities, 2) boost the economy and job creation, 3) empower our people, 4) promote mobility and spatial transformation, while at the same time 5) driving innovation within a culture of a truly competent state. 8

District Level:

Garden Route District identified a number of projects as part of its IDP development and review. These relate to studies that have been conducted throughout the district, strategies and implementation plans. These sector plans are coordinated by HOD's respectively, to ensure alignment with the Spatial Development Framework and the IDP timelines.

New sector plans may be developed and/or existing ones reviewed during the IDP Review process.

All Garden Route District Municipal sector plans, together with a number of policies, are accessible at Garden Route District Municipality, and can be made available to Local Municipalities on request.

5.2 Conclusion

The IDP Process Plan is a process that guides the planning, drafting, adoption and review of its IDP. It also provides a time schedule of activities and events to be undertaken in the process of developing the actual District IDP and supporting IDP processes of the LMs to ensure alignment.

5.3 Key Activities

Below is a summary of key activities in terms of the IDP, Budget and Performance Management, for development of the 2022/23 – 2026/27 IDP. It is important that the Time schedules of the B municipalities include all activities in green for alignment purposes.

Month	IDP	Performance	Budget	Legal Reference
Quarter September – October 2021				
PREPARATION & ANALYSIS				
September				
1 September 2021	Submit 2022/2023 IDP Budget Time Schedule with Council resolution to MEC – DLG NT and PT (GRDM) Advertise IDP Budget & PMS Time Schedule (GRDM)		Submit 2022/2023 IDP Budget Time Schedule with Council resolution to MEC – DLG NT and PT (GRDM) Advertise IDP Budget & PMS Time Schedule (GRDM)	MSA Section 21, 28(3)
September 2021	Council to submit unaudited tabled annual report to MPAC for vetting and verification of councils' directive on service delivery and the committee to evaluate Senior Managers' performance agreement entered into			Circular 63 of the MFMA MFMA Section 127(5)
1 September 2021	Annual Report is made public and representation is invited			MFMA Section 127(5)
September 2021			Start setting up spreadsheets for budget submissions (Budget Office)	MFMA Section 21(1) (b) MFMA Section 21 (1) (b)
September 2021			Review the Long term Financial Plan	MSA Section 26(h): An integrated development plan must reflect a financial plan, which must include a budget projection for at least the next three years.

Month	IDP	Performance	Budget	Legal Reference
9-10 September 2021	Provincial IDP Managers Forum Meeting			
29 September 2021	IDP Budget & PMS Representative Forum Meeting	IDP Budget & PMS Representative Forum Meeting	IDP Budget & PMS Representative Forum Meeting	MSA Section 56(2) The executive mayor must - (a) identify the needs of the municipality; (b) review and evaluate those needs in order of Priority MSA Section 29 (1) (b) MSA Section 56 (2)
September 2021	B Municipalities Public Participation Process			MSA Section 16(1)(a) MSA Section 29(1)(b)(i)
October				
8 October 2021	Annual Report: Closing date for comments on Annual Report			MFMA Section 129, 130
20 October 2021	MPAC Meeting – Oversight Report			Circular 63
October 2021	B Municipalities Public Participation Process			MSA Section 16(1)(a) MSA Section 29(1)(b)(i)
October 2021	Internal analysis <ul style="list-style-type: none"> critical issues / with respect to every service minimum service levels institutional 		Commence with salary, vehicle and operating budget Send out capital budget spreadsheets to departments	
			Deadline for operating budget inputs, e.g. salary budget and vehicle budget	
19 October 2021	IDP Budget & PMS Steering Committee to consolidate the analysis	IDP Budget & PMS Steering Committee to	IDP Budget & PMS Steering Committee to consolidate the analysis Phase	

Month	IDP	Performance	Budget	Legal Reference
	Phase	consolidate the analysis Phase		
STRATEGIES, PROJECTS & PROGRAMME IDENTIFICATION				
November				
1 November 2021 Local Government Elections				
23 November 2021	Workshop new Council on predecessors IDP			
25 November	New Municipal Council constituted			
November			Deadline for capital budget inputs from departments	
November	IGR Stakeholder and Sector Engagements to integrate sector plans into IDP			
9 November 2021	MMF & DCF		Due date for final adjustment budget submissions	
11 November 2021	Join District IDP & Public Managers Forum Meeting			
December				
December 2021		Finalise first draft of departmental operational plans and SDBIP for review against strategic priorities	Commence with compilation of Adjustments Budget (B Schedule and Report)	
9-10 December 2021	Provincial IDP Managers Forum Meeting			
December	Final Annual Report			Circular 63 of the MFMA

Month	IDP	Performance	Budget	Legal Reference
2021	and Oversight Report tabled to Council, submitted to PT NT, AG and made public			
INTEGRATION				
January				
January	Integrate and align to IDP documentation and draft SDBIP	Integrate and align to IDP documentation and draft SDBIP	Finalise in the prescribed formats incorporating National & provincial budget allocations	
January 2022			Finalise budget policies	
January 2022		Section 72 mid-year assessment report: Council Mayco Provincial Treasury National Treasury	Section 72 mid-year assessment report: Council Mayco Provincial Treasury National Treasury	MFMA Section 72(1): The accounting officer of a municipality must by 25 January of each year- (a) assess the performance of the municipality during the first half of the financial year... and (b) submit a report on such assessment to- (i) the mayor of the municipality; (ii) the National Treasury; and (iii) the relevant provincial treasury MFMA Section 54(1)(f): The mayor must, in the case of a section 72 report, submit the report to the council by 31 January of each year.
January 2022		Finalise KPIs and Annual Performance Targets	Adjustments Budget	MFMA Section 28(1): A municipality may revise an approved annual budget through an adjustments budget. MBRR Regulation 23(1): An adjustments budget may be tabled in the municipal council at any time after the mid-year budget and performance assessment has been tabled in the council, but not later than 28 February of the current year.
January 2022	Post Adjustments Budget, Mid-year Section 72 assessment as well as	Post Adjustments Budget, Mid-year Section 72	Post Adjustments Budget, Mid-year Section 72 assessment as well as the Annual Report on the website	MBRR Regulation 34(1): Within 5 working days of 25 January each year the municipal manager must make the mid-year budget and performance assessment public by

Month	IDP	Performance	Budget	Legal Reference
	the Annual Report on the website	assessment as well as the Annual Report on the website		placing it on the municipal website.
January	IDP Budget & PMS Steering Committee to prepare for institutional Strategic planning session	IDP Budget & PMS Steering Committee to prepare for institutional Strategic planning session	IDP Budget & PMS Steering Committee to prepare for institutional Strategic planning session	
FEBRUARY				
February 2022		Compile draft SDBIP	Finalise the draft capital and operating budget and budget related policies	
			Finalise detailed operating and capital budgets in the prescribed formats incorporating National and Provincial budget allocations, integrate and align to IDP documentation and draft SDBIP, finalise budget policies including tariff policy Note any provincial and national allocations to municipalities (DORA and Prov Gazette) for incorporation into budget	
February 2022	Technical Integrated Municipal Engagements with Provincial Sector Departments			
9 February 2022	Joint District IDP & Public Participation Managers Forum			
10 February 2022	MMF & DCF			
February 2022			Advertise Adjustments Budget and Mid-year Section 72 assessment in local newspapers	MBRR Regulation 26

Month	IDP	Performance	Budget	Legal Reference
Before February			Submit the approved adjustments budget to Provincial Treasury and National Treasury	MBRR Regulation 24(1)
Before February			Receive notification of any transfers that will be made to the municipality from other municipalities in each of the next three financial years (by no later than 120 days before the start of its budget year)	MFMA Section 37(2)
APPROVAL				
March				
10-11 March 2022	Provincial IDP Managers Forum Meeting			
March 2022	Table draft IDP and budget in Council (at least 90 days before the start of the budget year) <ul style="list-style-type: none"> • Budget Steering Committee • Submit to Mayoral Committee • Submit to Council 		Table draft IDP and budget in Council (at least 90 days before the start of the budget year) <ul style="list-style-type: none"> • Budget Steering Committee • Submit to Mayoral Committee • Submit to Council 	MFMA Section 16: The council of a municipality must for each financial year approve an annual budget for the municipality before the start of that financial year. In order for a municipality to comply with subsection (1), the mayor of the municipality must table the annual budget at a council meeting at least 90 days before the start of
April				
April 2022	Make public the IDP, annual budget and supporting documentation and invite the community to submit representations for 21 days		Make public the IDP, annual budget and supporting documentation and invite the community to submit representations	MFMA Section 22(a)
April 2022	Submit the draft IDP and budget to the Local Government, Provincial		Submit the draft IDP and budget to the Local Government, Provincial Treasury, National Treasury and other affected organs of state	MFMA Section 22(b)

Month	IDP	Performance	Budget	Legal Reference
	Treasury, National Treasury and other affected organs of state			
7 April 2022	Technical Strategic Planning Session			
20-22 April 2022	Institutional Strategic Planning Session			
	Process of consultation and meetings with local community and stakeholders, Provincial and National Treasury and other organs of State. (LGMTEC)	Process of consultation and meetings with local community and stakeholders, Provincial and National Treasury and other organs of State. (LGMTEC)	Process of consultation and meetings with local community and stakeholders, Provincial and National Treasury and other organs of State. (LGMTEC)	MFMA Section 23(1)
May				
5 May 2022	IDP Budget & PMS Rep Forum	IDP Budget & PMS Rep Forum	IDP Budget & PMS Rep Forum	MFMA Section 23(1): When the annual budget has been tabled, the municipal council must consider any views of – (a) the local community.
May 2022	Table final IDP and budget in Council (at least 30 days before the start of the budget year)		Completion of Annual Budget amendments / Refinements Table final IDP and budget in Council (at least 30 days before the start of the budget year)	MFMA Section 24(1):
May 2022	Place the IDP, annual budget, all budget-related documents and		Place the IDP, annual budget, all budget-related documents and all budget-related policies on the website (within 5 days of the	MFMA Section 75(1)

Month	IDP	Performance	Budget	Legal Reference
	all budget-related policies on the website		adoption of the plan)	
June				
June 2022	Give notice to the public of the adoption of the IDP and that copies or extracts are available for public inspection at specified places (within 14 days of adoption)		Make public the approved annual budget and supporting documentation (including tariffs) (within 10 working days after approval of the budget)	MSA Section 25(4)(a) MSA Section 25(4)(b)
June 2022	Publicise a summary of the IDP			
June 2022	If amended IDP submit copy to the MEC for Local Government (within 10 days of adoption)		Submit approved budget to the Provincial Treasury and National Treasury (within 10 working days after approval of the budget)	MSA Section 32(1)(a) MFMA Section 24(3)
June 2022		Submit to the Executive Mayor the draft SDBIP and draft annual performance agreements for the next year (within 14 days after approval of the budget)		MFMA Section 69(3):
June 2022		Place the performance agreements and all service delivery agreements on the website		MFMA Section 75(1):

Month	IDP	Performance	Budget	Legal Reference
June 2022		Submit copies of the performance agreements to the MEC for local government Submit the SDBIP to National and Provincial Treasury (within 10 working days approval of the plan)		MFMA Section 53(1)(c)(ii) MFMA Section 53(3)(b): MBRR Reg 20(2)(b): MFMA Section 53(3)(a):
June 2022		Make public the performance agreements of		MFMA Section 53(3)(b): .
9 June 2022	Joint District IDP & Public Managers Forum meeting to discuss the District Framework and IDP Budget & PMS Process Plan			
12 June 2022	MMF & DCF			
10-11 June 2022	Provincial IDP Managers Forum Meeting			
Preparation/Planning				
15 July 2022	District IDP Budget & PMS Alignment Working Session	District IDP Budget & PMS Alignment Working Session	District IDP Budget & PMS Alignment Working Session	MFMA Section 75(1) 21, 53, 68, 77 MFMA Section 53(3)(b) Municipal Structures Act, 1998 Part 4 & S83, 88
20 July 2022	IDP Budget & PMS Steering Committee to outline the IDP Review	IDP Budget & PMS Steering Committee to	IDP Budget & PMS Steering Committee to outline the IDP Review Process	Municipal Systems Act, 2000, Sections 17, 34, 76-81, 105

Month	IDP	Performance	Budget	Legal Reference
	Process	outline the IDP Review Process		
August 2022		Panel evaluation of the previous financial year's performance		
August 2022		External Audit Committee: Evaluation of the annual financial statements and Annual Performance Report	Budget Steering Committee to discuss rollovers, savings declarations and new applications	
5 August 2022	MMF & DCF			MPR Regulation 27(4)(d) and (e)
			Submit annual financial statements and annual performance report to the Auditor-General for auditing (within two months after the end of the financial year)	
August 2022	Council Approval of IDP and Budget time schedule		Council Approval of IDP and Budget time schedule	
August 2022	First Draft of Annual Report tabled to Council	First Draft of Annual Report tabled to Council	First Draft of Annual Report tabled to Council	MSA Section 126(1)(a): The accounting officer of a municipality must prepare the annual financial statements of the municipality and, within two months after the end of the financial year to which those statements relate, submit the statements to the Auditor-General for auditing MFMA Section 21(1)(b) Circular 63 of the MFMA

Dates provided in this time schedule are preliminary dates and subject to change. Final approval is in May 2022