



MAKANA
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**INTEGRATED DEVELOPMENT
PLAN/BUDGET AND PERFORMANCE
MANAGEMENT PROCESS PLAN
2016/ 2017**

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SECTION 1: BACKGROUND

1.1. THE INTEGRATED DEVELOPMENT PLANNING PROCESS

The Integrated Development Planning (IDP) Process is a process through which Municipalities prepare strategic development plans for a five year period. An IDP is one of the key tools for Local Government to cope with its developmental role and seek to arrive at decisions on issues such as municipal budget, land management, promotion of local economic development and institutional transformation in a consultative, systematic and strategic manner.

According to the Municipal Systems Act (MSA) of 2000, all Municipalities have to undertake the preparation of an IDP process plan to guide the development of an Integrated Development Plan. As the IDP is a legislative requirement, it has a legal status and it supersedes all other plans that guide development at Local Government level.

Section 26 of the MSA, stipulates the core components of the IDP as following:

- 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 and identification of communities which do not have access to municipal service.
- c) The Council's development priorities and objectives for its elected term, including the local economic development aims and its internal transformation needs.
- d) The Council's development strategies which must be aligned with any national and provincial sectoral plans and planning requirements binding on the Municipality.
- e) The 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 the key performance indicators and performance targets determined in terms of Section 41 of the MSA.

SECTION 2: OBJECTIVES AND APPROACH

2.1. OBJECTIVE OF THE IDP REVIEW PROCESS

The Makana Municipality wants to continue to develop the IDP as an effective management tool for the municipality, this includes:

- Creating a greater level of focus and thereby improving on the strategic nature of the document.
- Aligning this strategic document with the realities of the resources available i.e. financial and human,
- Alignment of the IDP with the activities of the Sector Departments and other service providers (and vice versa) and
- Alignment of the IDP with the various sector plans.

2.2. APPROACH TO THE 2015/16 IDP REVIEW

- Strategic review of the content of the 2015-2016
- Review of Sector plans
- Community Based Planning Approach
- Sector Alignment
- IDP –Budget Alignment
- Sector Alignment
- Community Engagement(Public Participation) for approval
- Finally, the preparation of the IDP which consists of Core and Non-core elements. These are define as follows:

a) CORE ELEMENTS

The ‘core elements’ of the IDP correspond to the core function of municipalities as outlined in the Municipal Systems Act and other legislation, the DPLG’s Guide Pack III (DPLG, 2000), critical elements that have arisen from the preparation of the IDP’s over the past years, as well as the comments from the MEC for the Department Cooperative Government and Traditional Affairs.

The core components of the 2015/16 IDP process are grouped as follows:

- Comments received from the various role players in the IDP process including the comments from the MEC.
- Medium Term Planning Framework
- Six Key Performance areas as outlined in the IDP Assessment tool.
- Areas including additional attention in terms of legislative requirement.
- Areas identified through self-assessment.
- The update of the IDP objective, strategies and projects.
- The preparation of the Sector Plans and incorporation of recommendations into the new IDP.
- Performance Management System (PMS)
- The Spatial Development Framework
- District/Local Municipality's alignment strategies and
- Integrated Communication Plan

b) NON-CORE ELEMENTS

Non-core elements are those programmes and Sector Plans that have been prescribed by various Government Departments, but guidelines for the preparation and /or funds have been set aside for the preparation of these Plans.

SECTION 3: ORGANISATIONAL STRUCTURES/ INSTITUTIONAL ARRANGEMENTS

3.1. IDP STEERING COMMITTEE

As part of the IDP preparation process, the IDP Steering Committee will be revived and will perform the function of internal co-ordination and alignment.

The Chairperson of the Committee will be the Chairperson of Budget, Treasury and IDP Portfolio Committee. The Secretariat will be the function of the IDP Manager. The Committee will comprise Heads of Departments, relevant Senior Officials and the (Mayoral Committee including the Executive Mayor).

In terms of the guideline IDP manual, the IDP Steering Committee is intended to be a working group made up of dedicated Heads of Department and other senior officials, who support the IDP Manager and ensure a smooth planning process. Although the IDP Manager is responsible for the IDP process, functions can be delegated to a member of the Steering Committee.

The IDP Steering Committee has no decision making powers, but is an advisory body to the Representative Forums. For instance, it can consider and comment on the inputs from subcommittees, National, Provincial Department and Service Providers.

3.2. THE IDP MANAGER AND RESPONSIBILITIES

Amongst other, the following responsibilities have been allocated to the IDP Manager for the IDP Process:

- To ensure that the Process Plan is finalised and adopted by Council.
- To adjust the IDP according to the proposals of the MEC.
- To identify additional role players to sit on the IDP Representative Forums.
- To ensure the continuous participation of role players.
- To ensure appropriate procedures are followed.
- To ensure documentation is prepared properly.
- To oversee the day to day management of the IDP Process.
- To respond to comment and enquiries.
- To ensure alignment of the IDP with other IDP's within the District Municipality.
- To co-ordinate the preparation of the Sector Plans and their inclusion into IDP documentation.
- To co-ordinate the inclusion of the Performance Management Systems (PMS) into the IDP.
- To submit the reviewed IDP to the relevant authorities.

3.3 IDP REPRESENTATIVE FORUM

The IDP Representative Forum that was constituted for the previous IDP Process will be utilised and continue to function throughout this IDP Process. Additional effort will need to be made to include more organisations and ensure their continued participation throughout the IDP Review. It is therefore recommended that advertisements be placed in the local newspaper, on notice boards and over the radio stations to inform the community members of the IDP participation process through the IDP representative forum.

3.3.1 Suggested Public Participation Representative Forums:

- a. Community Stakeholder Forum
- b. Sector Alignment Forum(to be clustered according development needs)
- c. Business and Non Governmental Organisation(to Categorized)

SECTION 4: DISTRIBUTION OF ROLES AND RESPONSIBILITIES

4.1 SUMMARY OF ROLE PLAYERS /RESPONSIBILITIES

The following are the role players in the IDP Process:

- Council and the Executive Committee
- Mayor
- Municipal Manager
- IDP Manager
- IDP Technical Committee (New)
- IDP Steering Committee
- Municipal Officials
- Representative Forum
- The District Municipality
- Relevant Government Departments and Service Providers.

The main roles and responsibilities allocated to each of the role players are set out in the following table:

TABLE 1: ROLES AND RESPONSIBILITIES (INTERNAL)

ROLE PLAYERS	ROLES AND RESPONSIBILITIES
Council	<ul style="list-style-type: none"> • Final decision making • Approval of the reviewed IDP documentation.
Ward Councillor	<ul style="list-style-type: none"> • Linking the IDP process with their constituencies. • Organising public participation at ward level.
Mayor	<ul style="list-style-type: none"> • Manage the drafting of the IDP. • Assign responsibilities to the MM. • Submit the IDP Process Plan to Council for approval. • Chairs the IDP Technical and IDP Rep Forum.
Municipal Manager	<ul style="list-style-type: none"> • Prepare IDP process plan. • Ensure that timeframes are adhered to. • Decide on and monitor IDP process. • Overall management and co-ordination.
Mayoral Committee	<ul style="list-style-type: none"> • To help to harness common understanding between political and administrative component before the IDP reports are considered at Council meeting. • Makes recommendations to the IDP Representative Forum.
IDP Manager	<ul style="list-style-type: none"> • Day to day management of the IDP process. • Co-ordinate technical or sector expertise. • Co-ordinate Sector plan inputs • Prepare draft progress reports.
IDP/Budget and Performance Management Steering Committee	<ul style="list-style-type: none"> • Assist and support the Municipal Manager/CFO/IDP Manager and IDP Representative Forum. • Information “GAP” identification. • Oversee the alignment of the planning process internally with those of the Local Municipality areas. • Portfolio head to lead related Portfolio matters

	<ul style="list-style-type: none"> • Assist in prioritisation IDP strategies and Budget.
The District Council	<ul style="list-style-type: none"> • Co-ordination role with all Local Municipalities within the District. • Ensuring horizontal and vertical alignment of the IDP's of the Municipalities in the District Council area. • Facilitation of vertical alignment of IDP's with other spheres of Government and Sector Departments. • Provide events for joint strategy workshops with Local municipalities, Provincial and National role players and other subject matter specialist.

TABLE 2: ROLES AND RESPONSIBILITIES (EXTERNAL)

ROLE PLAYERS	ROLES AND RESPONSIBILITIES
Ward Committees	<ul style="list-style-type: none"> • To be consulted on an individual or collective basis to establish community needs and reach consensus on IDP Projects/Initiatives and Priorities.
IDP Representative Forum	<ul style="list-style-type: none"> • Representing public interest and contributing knowledge and ideas.
Government Departments, Parastatals and NGO's	<ul style="list-style-type: none"> • Provide data and information. • Budget information • Alignment of budget with the IDP • Provide professional and technical support. • To assist in facilitating the CBP
DBSA Planning Expert and Sarah Baartman DM	<p>Methodology guidance and professional support in:</p> <ul style="list-style-type: none"> - Strategic and Town Planning - Sector Plan Inputs - IDP Document preparation. - Alignment with National, Provincial and CDM

SECTION 5: INTEGRATED IDP/BUDGET AND PERFORMANCE MANAGEMENT PROCESSES PLAN ACTION PROGRAMME

A detailed activity and associated timelines is attached as: **Annexure A**

SECTION 6: MECHANISMS FOR COMMUNITY AND STAKEHOLDER PARTICIPATION

PHASE	PARTICIPATION MECHANISMS
Analysis	Community Based Planning
	IDP Representative Forum (Community Stakeholder Forum)
	IDP Representative Forum (Stakeholders Alignment engagement)
	IDP Representative Forum (Business/Non Governmental Forum)
Strategies and Objectives	District Level Strategy workshops
	IDP Representative Forum meetings
	Steering Committee Meeting
Project Proposals	IDP Representative Forum Meeting
	Steering Committee Meeting
Integration	IDP Representative Forum (Sector Stakeholder Alignment Forum)
Approval	Mayoral Imbizo's Community Engagement on budget
	Opportunity for comments from residents and stakeholder organisations

SECTION 7: MECHANISMS FOR ALIGNMENT

SPHERE	DEVELOPMENT PLANNING INSTRUMENT	RESOURCE ALLOCATION	ANNUAL CYCLE	REVIEW CYCLE
National	Medium Term Strategic Framework (MTSF)	National Budget: Medium Term Expenditure Framework (3 years)	1 April – 31 March	July - September
Provincial	Provincial Growth and Development Strategies	Medium Term Expenditure Framework (3 years)	1 April – 31 March	July - September
Sector	Strategic Plans for sector departments	MTREF (3 years)	1 April – 31 March	July – September
Local/Rhodes University	Integrated Development Plan	Municipal Budget (5 year plan)	1 July -30 June	September – February

1.

ANNEXURE A: TIME SCHEDULE

IDP/PMS and Budget Process Plan 2016-17				
CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
Meeting Schedule – July to December 2015	Council	Support and oversight	Makana Local Municipality	
	MPAC			
	Aesthetic Committee			18 July 2016
	LLF			19 July 2016
	Tourism & Cultural Industries			26 July 2016
	Social Development			27 July 2016
	Infrastructure Development			28 July 2016
	Local Economic Development			
	Finance, Admin, Mon & Ev (F&C)			
	Mayoral Committee			12 July 2016
	Training Committee			
	Library Advisory			
	Budget Steering Committee			15 July 2016
	Audit Committee			21 July 2016
Local Aids Council				
IDP	Attending a meeting in Sarah Baartman District Municipality	District consultation with Local Municipalities for support and tracking progress on IDP processes	IDP/ PMS Manager	18 July 2015
Meeting Schedule: July – December 2015	Council	Support and Oversight	Makana Local Municipality	30 Aug 2016
	MPAC			19 Aug 2016
	Aesthetic Committee			29 Aug 2016
	LLF			30 Aug 2016
	Tourism & Cultural Industries			
	Social Development			
	Infrastructure Development			

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
	Local Economic Development			02 Aug 2016
	Finance, Admin, Mon & Ev (F&C)			04 Aug 2016
	Mayoral Committee			16 Aug 2016
	Training Committee			22 Aug 2016
	Library Advisory			25 Aug 2016
	Budget Steering Committee			12 Aug 2012
	Audit Committee			25 Aug 2016
	Local Aids Council			05 Aug 2016
IDP/Budget	Preparation tabling of timelines to Council an IDP/ Budget Time table	Review Process Plan and develop IDP/PMS and Budget time schedule for 2015/16 (MFA S35 (1)).	<i>IDP/PMS Manager and CFO</i>	30 Aug 2016
IDP/Budget	Upload Process Plan 2016/17 on Website and publicise in local newspaper	Notify the public of on key planning process	<i>IDP/PMS Manager and CFO</i>	02 Sept 2016
IDP and Budget	Planning of the next three year budget in accordance with ordination role of the budget process (<i>Budget plans, capital / operational budget to have been consolidated (based on the budget inputs submitted by Departments)</i>)	Consultation internal stakeholders	Accounting officer and Sec 57 Directors	Sept 2016
EM	Mayors' Forum		SBDM	

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP n Public Participation	Call for civil society to register for Representation on Rep Forum; Update database and reconstitute public participation structures (e.g. IDP Representatives Forum) (Same advert as above)	Legislative requirement to ensure inclusivity in budgetary and planning processes.	Accounting officer CFO, IDP Official	02 Sept 2016
	Council	Support and Oversight	Makana Local Municipality	
	MPAC			23 Sept 2016
	Aesthetic Committee			
	LLF			
	Tourism & Cultural Industries			13 Sept 2016
	Social Development			14 Sept 2016
	Infrastructure Development			15 Sept 2016
	Local Economic Development			20 Sept 2016
	Finance, Admin, Mon & Ev (F&C)			22 Sept 2016
	Mayoral Committee			
	Training Committee			
	Library Advisory			28 Sept 2016
	Budget Steering Committee			12 Sept 2016
	Audit Committee			
	Local Aids Council			
	MScoa Implem. Steering....			16 Sept/ 26 Sept 2016

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP Public Participation	Undertake ward-wide Community Base Planning workshops.	Present IDP Process Plan / Time Schedule; Present 2016/17 ward priorities; report back on project progress; cost implications and challenges. Obtain new needs to be prioritised for 2016/17.	Accounting Officer	2nd Sept 2016
IDP Public Participation	Integrated Development Planning Community and Stakeholder engagement	Report to the Community on the development of IDP Review Process and Development of Recovery Plan	Accounting officer	Oct- Dec 2016
Meeting Schedule: July – December	Council	Support and Oversight	Makana Local Municipality	26 Oct 2016
	MPAC			
	Aesthetic Committee			
	LLF			
	Tourism & Cultural Industries			
	Social Development			
	Infrastructure Development			
	Local Economic Development			
	Finance, Admin, Mon & Ev (F&C)			
	Mayoral Committee			
	Training Committee			
	Library Advisory			
	Budget Steering Committee			
	Audit Committee			

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
	Local Aids Council			07 Oct 2016
	MScoa Implem. Steering....			17/27 Oct 2016
MM	Municipal Managers' Forum		SBDM	
CFO	Chief Financial Officers' Forum		SBDM	
PMS	Signing and uploading of SDBIP 2016/17 on Website and publicise	Notify the public of set targets and performance indicators	PMS Official	July 2016
PMS	First Quarter Performance Review	Legislative requirement	Accounting officer	Within 30 days after end of the Quarter
PMS	Review of performance by Internal Audit	First Quarter Performance Evaluation Reports in preparation for Councils consideration for adoption	Council	
PMS	Submission of Draft Performance Agreements (2016/17) Managers reporting to the Administrator and Submit to MEC, upload on Website and publicise.	Legal requirement	Municipal Manger	July 2016
PMS	Signing Performance Agreements and Submit to MEC, upload on Website and publicise	Legal requirement	Administrator	July 2016
PMS	Q1 Performance Assessment	Evaluation Sec 56/57 managers, lower levels if applicable and institution PMS - Legal compliance	MM and PMS Officer	October 2016
	Council	Support and Oversight	Makana Local Municipality	

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
	MPAC			
	Aesthetic Committee			07 Nov 2016
	LLF			08 Nov 2016
	Tourism & Cultural Industries			15 Nov 2016
	Social Development			16 Nov 2016
	Infrastructure Development			17 Nov 2016
	Local Economic Development			22 Nov 2016
	Finance, Admin, Mon & Ev (F&C)			24 Nov 2016
	Mayoral Committee			
	Training Committee			03 Nov 2016
	Library Advisory			24 Nov 2016
	Budget Steering Committee			11 Nov 2016
	Audit Committee			25 Nov 2016
	Local Aids Council			
	MScoa Implem. Steering...			18/28 Nov 2016
PMS	Review of Mid-inyear performance Report and Annual Report of previous year by MPAC and adoption by Council	Moderate Performance evaluation Reports in preparation for Council	MPAC and Council	January 2017
EM	Mayors' Forum		SBDM	
EM	District Aids Council		SBDM	
Community & Social Services	Disaster Management Advisory Forum		SBDM	
	Council	Support and Oversight		
	MPAC			02 Dec 2016
	Aesthetic Committee			
	LLF			

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
	Tourism & Cultural Industries			
	Social Development			
	Infrastructure Development			
	Local Economic Development			
	Finance, Admin, Mon & Ev (F&C)			
	Mayoral Committee			06 Dec 2016
	Training Committee			
	Library Advisory			
	Budget Steering Committee			12 Dec 2016
	Audit Committee			
	Local Aids Council			02 Dec 2016
	MScoa Implementation Steering....			
IDP/Budget	Determine the funding/ revenue projections for the next three years; The Executive Mayor to determine the strategic objectives for service delivery and development for the next three years (IDP reviews)	Budget preparation	CFO	1 Sept 2016
Budget	Preparation of the draft budget. CFO liaison heads of department for their departmental budget.	Legal requirement	<i>All Managers / Directors</i>	30 Sept 2016
IDP/Budget	Prioritisation	Preparation of Adjustment Budget	Accounting officer	January 2017
IDP	Strategic Planning Session	Track progress on implementation sees if targets are met. Review institutional functionality and verify level of Service Delivery. Facts and figures for consolidation with ward analysis. Review of the	Municipal Manager, Directors, Council and Union	January 2017

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
		financial strategies and key economic and financial planning assumptions. Project scoping and budget allocations.		
Budget	<i>Directors to have met with their HOD's and any relevant staff members to discuss draft capital / operational budget to ensure that anticipated expenditure meets parameters set out by National / Provincial Government.</i>	Legal requirement	<i>Directors / Budget Office</i>	February 17
IDP/Budget	<i>Submit proposed DRAFT 2016/17 Operating and Capital Budget requirements by directorates to the CFO</i>	<i>Preparation of the proposed budget and indicative 2016/17 forecast.</i>	<i>Municipal Manager, CFO and Section 56 Managers (Directors)</i>	26 Oct 2016
IDP/Budget	<i>Review Budget related policies and by-laws</i>	<i>Legal Compliance -review, update and check relevance</i>	CFO	<i>March 2017</i>
Budget	<i>Finalise the annual review of tariffs, fees and charges</i>	<i>To determined increase to be undertaken to cover services delivery.</i>	<i>Municipal Manager, CFO and Directors</i>	02 January 2017
IDP	Convene the IDP and Budget Steering Committee meeting.	<i>Report on refined objectives and strategies, planned strategic interventions and proposed amendments to the organogram in response to overcome challenges. P+C47resent consolidated proposed Directorate projects and budget needs.</i>	<i>Municipal Manager and CFO</i>	Monthly

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP	Convene the second IDP Representatives Forum meeting (community engagement)	Report on community needs; Report on interventions and strategies to deal with developmental challenges. Sectors to report on project progress for 2015/16 and submit Sector projects and indicative budget allocations for 2015/16	Municipal Manager, Mayor and IDP Official	15 Nov 2016
IDP	Submission of the Sec 72 Performance Report	Legal compliance	MM, CFO and Mayor	25 January 2017
All	Prepare and submit audit action plan.	To address the shortfalls identified by the AG.	Municipal Manager and CFO	25 January 2017
PMS	Q2 Performance Reporting.	Evaluation Sec 56 managers, lower levels if applicable and institution PMS - Legal compliance	MM and PMS Officer	25 January 2017
PMS	Q2 review by Internal Audit	Preparation of Annual Performance Report for MPAC	MM, PMS Manager and Internal Audit Unit	25 January 2017
IDP	IGR Session to facilitate alignment	Align provincial and national programmes with IDP	Municipal Manager	By end February
Budget	Review proposed National and Provincial Government allocations to the Municipality for incorporation into the Draft Budget for tabling	Budget Preparation	CFO	Publication of DORA Mid – March 2017

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
PMS and Finance	<i>Mid- year budget and performance assessment visits</i>	Tabling Mid- Inyear assessment report	<i>Directors / Budget Office</i>	January 25, 2017
EM	<i>Mayors' Forum</i>		<i>SBDM</i>	
MM	<i>Municipal Managers' Forum</i>		<i>SBDM</i>	
CFO	<i>Chief Financial Officers' Forum</i>		<i>SBDM</i>	
DTIS	<i>District Wide Infrastructure Forum</i>		<i>SBDM</i>	
IDP	Convene the third IDP and Budget Steering Committee - alignment	Finalise internal alignment and project register. Ensure budget alignment between the Draft IDP and Draft SDBIP with agreed upon targets and performance indicators per project.	All Managers / Directors	Early March 2017
IDP	Convene the third IDP Representatives Forum meeting - alignment	Present the Final Draft IDP and Draft SDBIP. Sector Dept. report on project implementation for 2014/15 and confirm project and budget allocations for 2015/16. (Finalise external project alignment)	Municipal Manager, Mayor and IDP Official	10 March 2017
IDP	In collaboration with Council develop and publicise the final Draft IDP and Budget 2016/17 Roadshow Programme	Make citizens aware of IDP / outreaches, prior to the adoption of the final Draft IDP and Budget. Secure venues and arrange logistics for scheduled meetings.	Office of the Mayor, Municipal Manager, IDP Officer and CFO	March 2017

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP/.Budget	Submit 2016/17 Draft Capital and Operating Budgets, Draft IDP and Draft SDBIP Standing Committee	For scrutiny before tabling to Council	Municipal Manager and CFO	23 Mar 2017 7 days before tabling
IDP/.Budget	Table 2016/17 Final Draft IDP and Capital and Operating Budgets	Council to consider and adopt the final Draft IDP.	Municipal Manager and CFO	29 March 2017
IDP/.Budget	Submit adopted draft IDP to the MEC for local government	Pre assessment interaction.	MM and IDP Officer	By 12 April 2015 Within 10 days after adoption
IDP/.Budget	Upload the Council approved Draft IDP and Budget (2016/17) on the municipal website and place a notice in local newspapers for public inspection (21days).	Legal Requirement to allow public to raise objections / comments on the adopted Draft IDP and Budget.	Municipal Manager; CFO and IDP Officer	8 April 2016 Within ten days of adoption
IDP/.Budget	Forward 2016/17 Draft Capital and Operating Budgets and Draft IDP to National Treasury and Provincial Treasury and any prescribed national or provincial organs of state and other municipalities affected by the budget.	Legal compliance as a control measure between Treasury and the LM.	Municipal Manager and CFO	12 April 2017 Within ten days of adoption

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP/.Budget	All Draft Budget Documents, Draft IDP, Draft SDBIP and relevant items must be ready for the Council meeting of end March 2017.	IDP and Budget preparing	<i>IDP/PMS Manager and CFO</i>	Mar- 2017
IDP/.Budget	Executive Mayor to have tabled draft budget, resolution, plans and changes to the IDP to Council + MM to ensure that all Draft Documents are forwarded to the relevant stakeholders (e.g. Government Departments, District Municipality, etc.).	IDP and Budget preparing	<i>Executive Mayor / Municipal Manager</i>	Mar- 2017
IDP/.Budget	Mayor to have completed public hearings on the budget + IDP where the Executive Mayor and Councillors present budget + IDP to the communities for comments or contributions (public participation process).	IDP and Budget preparing	<i>Executive Mayor / All Councillors / Senior Management / HOD's</i>	Apr/ May 2017
CFO	Chief Financial Officers' Forum		<i>SBDM</i>	
CSS	Disaster Management Advisory Forum		<i>SBDM</i>	
EM	District Aids Council		<i>SBDM</i>	
PMS	Q3 Performance Reporting.	Evaluation Sec 56/57 managers, Middle management levels if applicable and institution PMS - Legal compliance	MM and PMS Officer	April 2017

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
PMS	Q3 review by Internal Audit	Preparation of Annual Performance Report for MPAC	MM, PMS Manager and Internal Audit Unit	End April 2017
PMS	Review of performance by MPAC	Moderate Performance evaluation Reports	MPAC and MM	End April 2017
IDP and Budget	IDP Pre assessment interaction.	Monitor state of readiness to adopt Final IDP and Budget.	CoGTA and LM	During April 2016
IDP and Budget	Undertake IDP and Budget Roadshows.	Allow opportunity for community to be part of municipal planning and be informed of the impact of IDP within their ward.	Mayor, Ward Councillors, Municipal Manager, CFO and Directors	April 2017
IDP and Budget	Consolidate all public participation inputs and comments in respect of 2016/17 Draft IDP and Budget	Table to Mayor for consideration before the adoption of the Final 2016/17 IDP and Budget.	Municipal Manager and CFO	Early May 2017
IDP and Budget	Budget Documents, IDP, SDBIP and relevant items must be ready for the Council meeting of end May 2017.	IDP and Budget preparing	IDP/PMS Manager and CFO	May-17
IDP and Budget	Mayor to have presented final budget to Council for adoption and to have included operating / capital budget, resolutions, tariffs, capital implementation plans, operational objectives, changes to IDP and budget plans.	IDP and Budget preparing	Executive Mayor / CFO and IDP/PMS Manager	May-17

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP and Budget	Convene 4th IDP and Budget Steering Committee - consider comments and finalise	Interrogate community inputs and finalise SDBIP/IDP alignment and any necessary amendments to the IDP and budget.	Municipal Manager and IDP Official and CFO	Mid May 2017
IDP and Budget	Convene the 4th IDP Representatives Forum meeting to present final IDP for consideration	Present the FINAL IDP . Report on public engagement and outcome of the 21-days public inspection and invite any last changes or additions to sector project register.	Municipal Manager, Mayor and IDP Official	1 Week after above meeting.
IDP and Budget	Submit 2016/17 IDP and Budget to the Standing Committee	Oversight before adoption.	Municipal Manager, CFO and Mayor	Mid May 2017
IDP and Budget	Adopt the Final IDP 2016/17 and MTEF Budget.	Legal compliance. Council to consider and approve.	Municipal Manager, CFO and Council	Before end May 2017
IDP and Budget	Upload adopted Final 2015/16 IDP and MTEF Budget on the municipal website	Legal compliance and access to strategic documents.	Municipal Manager and CFO	10 days after adoption
IDP and Budget	Submit approved IDP and Budget to the MEC for local government	Legal compliance	Municipal Manager	Within ten days of adoption -

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
IDP and Budget	MM to have ensured that all Budget / IDP documents are forwarded to the relevant stakeholders (e.g. Government Departments such as National and Provincial Treasuries, DPLG, etc.) in the correct formats, and that tariffs are published.	Legal compliance	MM / IDP Manager / CFO	Jun-17
IDP and Budget	<i>Draft SDBIP to have been tabled by the MM to the Executive Mayor</i>	Legal compliance	MM	Jun-17
IDP and Budget	<i>Final SDBIP's completed and KPI's drawn or finalised</i>	Preparation of SDBIP	IDP and PMS Managers	Jun-17
IDP and Budget	Final SDBIP, Performance Plans, Rating Calculators and Performance Agreement completed and signed for implementation as from the 1 July 2015 (2015/2016 Financial Year)	Preparation SDBIP and Finalise of Performance agreements	All Directors and Heads of Departments End the process starts again for the 2015/16 financial year...	Jun-17
IDP and Budget	Final IDP Provincial Assessment 2017	MEC comments	DM, LM, KPA leaders, CoGTA, Sector Departments	July 2017
EM	Mayor's Forum		SBDM	
	District Aids Council		SBDM	
CSS	Disaster Management Advisory Forum		SBDM	
DIS	District Wide Infrastructure Forum		SBDM	

IDP/PMS and Budget Process Plan 2016-17

CATEGORY	ACTION	PURPOSE	RESPONSIBILITY	DATE
CFO	Chief Financial Officers' Forum		<i>SBDM</i>	