

KNYSNA LOCAL MUNICIPALITY

IDP PROCESS PLAN

2022-2023

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SECTION ONE: INTRODUCTION AND BACKGROUND

1.1 Introduction

The Integrated Development Plan (IDP) process is a process through which this municipality prepare strategic development plans for the five-year period. This IDP is the key instruments for local government to cope with its new developmental role and seeks to arrive at decisions on issues such as municipal budgets, land management, promotion of local economic development and institutional transformation in a consultative, systematic and strategic manner.

In order to ensure certain minimum quality standards of the IDP process and proper coordination between and within spheres of government, the municipality need to prepare an IDP process plan and formulate budget to implement the IDP. The IDP and Budget Process Plan have to include the following:

- A programme specifying the timeframes 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 and budget formulation processes; and
- Cost estimates for the process.

The preparation of the IDP process plan is in essence the formulation of the IDP and Budget processes, set out in writing and requires the adoption by Council.

1.2 Legal Planning Context

The preparation of the IDP and Budget processes are regulated by the Municipal Systems Act, Act 32 of 2000 and the Municipal Finance Management Act, No 56 of 2003. This is to ensure certain minimum quality standards of the integrated development planning and budget process and proper coordination between and within the spheres of government.

As the IDP is a legislative requirement it has a legal status and it supersedes all other plans that guide development at local level.

The Municipal Systems Act, No 32 of 2000 Section 28(1)(2)(3) (as amended) and the Municipal Finance Management Act, Act 56 of 2003 confer the responsibility on the Mayor to provide political guidance over the budget process and the priorities that must guide the preparation of the annual budgets. In terms of section 53 of the Municipal Finance Management Act the Mayor must also coordinate the annual revision of the integrated development plan in terms of section 34 of the Municipal Systems Act and the preparation of the annual budget, and determine how the integrated development plan is to be

taken into account or revised for the purpose of the budget. The Municipal Systems Act further requires the following regarding the IDP process:

Chapter 5 and Section 25 (1) of the Municipal Systems Act (2000) indicate that:

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

- a) Links integrates and coordinates 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) Complies with the provisions of this Chapter; and
- d) Is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation.

In terms of the core components of the integrated development plan, Chapter 5 and Section 26 of the Municipal Systems Act (2000) indicate that:

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 and 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 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.

1.3 Alignment between IDP, Budget and PMS

In terms of the Municipal Systems Act, Knysna municipality is required to prepare an organisational performance management system that must be linked to the IDP. Tremendous

progress has been made with the process of aligning the IDP, Budget and Performance Management System (PMS).

The municipality will make every effort over the new term to fully link and integrated these three processes largely through the Process Plan. It should however, be noted that the Performance Management System (PMS) on its own requires an in-depth process comparable to that of the IDP. Such PMS is tightly linked and guided by the IDP and Budget processes.

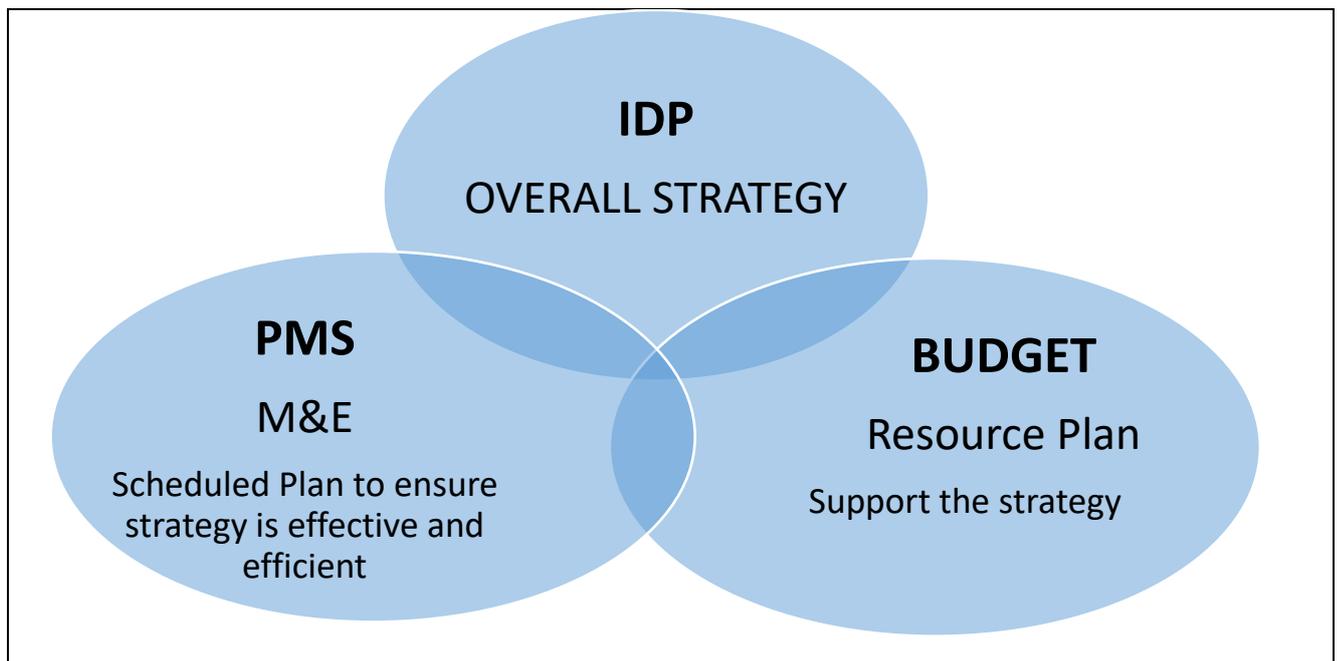
The PMS process will address the following issues:

- Alignment of the PMS, Budget and IDP processes;
- Implementation of individual performance management system at managerial level.

The IDP, performance management systems (PMS) and budget are all components of one overall development planning and management system. The IDP sets out what the municipality aims to accomplish, how it will do this. The PMS enables the municipality to check to what extent it is achieving its aims.

The budget provides the resources that the municipality will use to achieve its aims. As indicated earlier, every attempt is made in this process plan to align the IDP and PMS formulation and/or review, and the budget preparation process. The linkages of the three processes are summarised in the following diagram:

FIG 1: THE LINKAGES BETWEEN IDP, BUDGET AND PMS



THE KNYSNA LOCAL MUNICIPALITY IDP

1.4 The purpose of the process plan

Knysna Local Municipality Local Municipality needs to plan, direct and manage its capacity and resources to support the successful implementation of its integrated development planning process and the budget. The reality of limited capacity and resources in Knysna Local Municipality demands innovation and the need for greater inter-governmental cooperation between various spheres of government.

The Knysna Local Municipality process plan is a documented process describing how the municipality will develop and implement the integrated development plan through budget in its area of jurisdiction. Therefore, it will have a meaningful bearing on the foreseen IDP once completed and/or most importantly, it must lead to the process of developing an all-inclusive integrated development planning methodology to plan and actualize future development in Knysna Local Municipality through our budgetary allocations. The process plan describes the application of the municipality capacity and resources in support of its mandate of integrated development planning.

This plan means to ensure the proper management of the planning process through the following:

- Setting the scene to manage the planning process and legal requirements in planning for the implementation of the integrated planning system;
- A programme specifying time schedule that guide IDP and budget planning processes and various planning steps;
- Outlining appropriate mechanisms, processes and procedures on how the public, stakeholders, state organs can participate in the drafting of the IDP and formulation of the budget structures that will be used to ensure this participation
- Indicate necessary organisational arrangements to ensure the successful implementation of the integrated development planning process;
- Binding plans and planning requirements, i.e. policy and legislation;
- Mechanisms and procedures for vertical and horizontal alignment;
- A programme specifying how wills the process be monitored in order to manage the progress of the IDP and budget processes.

1.5 The annual budget

The Annual Budget and the IDP are inextricably linked to one another, something that has been formalised through the promulgation of the Municipal Finance Management Act (2004). Chapter 4 and Section 21 (1) of the Municipal Finance Management Act (MFMA) indicate that:

The Mayor of a municipality must-

(b) At least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for;

i. The preparation, tabling and approval of the annual budget;

ii. The annual review of

aa) The integrated development plan in terms of section 34 of the Municipal Systems Act; and

bb) The budget related policies.

iii. The tabling and adoption of any amendments to the integrated development plan and the budget-related policies; and

iv. The consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).

This Process Plan for the 5th Generation IDP 2022/2027 and Budget describes the operational plan for the IDP and Budget process identifying **what** should happen **when**, by **whom**, with **whom** and **where** during the process of formulating an IDP for the Knysna Local Municipality.

SECTION TWO: IDP DEVELOPEMENT PROCESS

2.1 Key elements to be addressed in this process

During the IDP and Budget consultative sessions, an IDP/Budget Steering Committee under the leadership of the Executive Mayor must address service delivery challenges across the municipality dating as far back as the 3rd and 4th Generation IDP's service delivery needs. This we must undertake as we fulfil our Constitutional mandate utilising inter-governmental processes and platforms by means of strategic partnerships to coordinate development process.

The Municipality will pursue strategic goals during this term of Council as per the, Medium-Term Strategic Framework and Five Year Local Government Strategic Agenda:

- To ensure **service excellence** within and around Knysna Local Municipality To stimulate integrated and sustainable **economic development**;
- To improve and sustain **financial, human resource and management** excellence;
- To evolve **institutional excellence** through a thoroughgoing institutional reengineering, effective leadership and effective long range development planning.

The municipality will accelerate implementation to roll back existing service delivery backlog identified during previous IDP consultative processes, and in line with the financial status of the municipality.

The following is a summary of the main activities to be undertaken during this IDP Process:

2.1.1 Refine and/or develop the strategic elements of the IDP in terms of council's new priorities

- Review the vision, mission and objectives;
- Develop strategy elements of the IDP;
- Determining programmes to achieve the strategic intent;
- Develop and enhance existing institutional plans ;
- Develop a fully integrated spatial development framework ;
- Strengthen Performance Management system and cascading of performance management;
- Develop organisational scorecard;
- The preparation and review (if required) of relevant sector plans

2.1.2

2.1.3 Assessment issues

- Comments received from Councillors, Ward Committees and other various role-players in the presentation and assessment of the IDP,
- Gaps in terms of shortcomings and weaknesses identified through self-assessment of previous IDP's
- Current status on the implementation process.

2.1.4 Details of activities to accomplish outputs

- *Incorporation of role-players inputs in planning process*

In developing the IDP for the newly constituted Council, the Municipality need to assess the impact on the achievement of the IDP development priorities. This include reviewing all projects and programs linked to MTREF. In this way the Municipality will focus on the implementation for the coming three years, while on the other hand is able to monitor and evaluate implementation progress on those programmes, projects and services.

- *Review of progress with lessons for the future*

The starting point in understanding the current developmental situation is the review of the relevance of the strategies developed and applied to achieve the past and current set goals.

Secondly we need to determine the extent of implementation with regard to projects, programmes and services against IDP plans for the previous years. Some of this can be from secondary data (e.g. previous annual reports). The review of the organisational performance for the 2019-20/21 financial year(s) would provide an opportunity to review progress for the IDP and also assist in making information for the annual report readily available, as well as determining the implications for the future. It is suggested that the two processes are integrated, and a format used which ensures that directorates provide lessons learned and implications for the future, as well as analysis of what they have done. This will build on refining and/or developing section 3.2 as part presentation and discussion, so that we are able to come up with coherent recommendations across the Municipality.

- *Core elements of the IDP preparation*

The core elements of the IDP preparation correspond to the core functions of the municipalities as outlined in the Municipal Systems Act and other legislations, including the critical elements that came up during the IDP development and review in the past years.

The core components of the integrated development plan follow:

- 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;

- an assessment of the existing level of development in the municipality, which must include the identification of communities which do not have access to basic municipal services;
- the council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;
- 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;
- a spatial development framework which must include the provision of basic guidelines for a land use management system for the municipality;
- the council's operational strategies;
- applicable disaster management plans;
- 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 Municipal Systems Act.

2.1.5 Inclusion of new information where necessary

- Addressing areas requiring additional attention in terms of legislative requirements not addressed during the previous years of the IDP Review
- Process (i.e. MFMA);
- Alignment of the IDP with newly completed Knysna Local Municipality Statutory Plans;
- Development of the Strategic elements of the IDP;
- The ongoing alignment of the Knysna Local Municipality Performance Management System (PMS), in terms of Chapter 6 of the MSA, with the IDP;
- The update of the Financial Plan, the list of projects (both internal and external), and the capital investment framework;
- Incorporate final Ward Projects in term of Medium Term Revenue and Expenditure Framework (MTREF).

SECTION THREE: HORIZONTAL AND VERTICAL ALIGNMENT

3.1. Framework plan

In terms of Chapter 5 and Section 26 of the Municipal Systems Act (2000), districts are required to prepare and adopt a Framework Plan which indicates how the district and Local Municipalities will align their IDPs. The Framework Plan provides the linkage and binding relationships to be established between the district and local municipalities in the district and in doing so, proper consultation, coordination and alignment of the review process of the district municipality and various local municipalities can be maintained.

Alignment with service providers is essential to ensure that the district and local municipality's priorities can be reflected in the service providers' project prioritisation process and in turn the service providers' projects can be reflected in the IDP document. Regular meetings with service providers would be required in the course of IDP review process

Cross-border alignment with neighbouring municipalities is also necessary to ensure the spatial coordination of development effort. This can be achieved by using the existing Provincial Coordinating IDP INDABA as well as strategic discussions between neighbouring local municipalities.

3.2. Alignment with stakeholders

It is anticipated that an IDP and Budget Conference and IDP Programme Workshops which will be led by MAYCO and Directors will create such a platform as well as a series of individual meetings with key organs of the state.

3.3 Stakeholders in the IDP process

- *Municipality*

The IDP guides the development plans of the local municipality.

- *Councillors*

The IDP gives councillors an opportunity to make decisions based on the needs and aspirations of their constituencies.

- *Communities and other stakeholders*

The IDP is based on community needs and priorities. Communities have the chance to participate in identifying their most important needs. The IDP process encourages all stakeholders who reside and conduct business within a municipal area to participate in the preparation and implementation of the development plan.

- *National and provincial sector departments*

Many government services that affect communities at local level are delivered by provincial and national government departments -for example: police stations, clinics and schools. Municipalities must take into account the programmes and policies of these departments. The departments should participate in the IDP process so that they can be guided how to use their resources to address local needs.

SECTION FOUR: PUBLIC PARTICIPATION IN THE IDP PROCESS

4.1. Public Consultation

Public consultation forms an integral part of the IDP preparation and formulation process under the direct leadership of the political heads of the institution. The municipality's direct links with communities are councillors whom represent the direct interests of communities. Community or public consultation must thus be driven and directed by council, technically supported by the bureaucracy based on the nature of support required.

The Mayor and Speaker will chair public consultation sessions with the public as public representatives, supported by ward councillors in the respective areas where consultations will be undertaken.

The logistical and technical support provided by the administration must be aligned with the IDP planning process and directed towards achieving IDP outcome.

SECTION FIVE: ORGANISATIONAL ARRANGEMENTS

5.1 IDP institutional and management arrangements

The IDP and Budget formulation process will be guided and undertaken within the following organizational management mechanisms:

- Municipal Council is the final decision-making/approval of IDP and will continuously monitor progress of the development and implementation of its IDP;
- Councillors will be responsible for linking integrated development planning process to their constituencies/wards;
- IDP/Budget Steering Committee of politicians to drive the process, and make key strategic decisions needed at various points on the way;
- TMT (Senior Management Team) chaired by the Municipal Manager to drive the administrative part of the process;
- IDP Task Team across directorates, line management level to drive the IDP;
- IDP Representative Forum/Budget Conference to consult with stakeholders.

IDP/Budget Steering Committee and TMT meet alternately on a two weekly basis. MAYCO will also devote IDP/Budget as a standing item on the agenda for other MAYCO meetings during the IDP preparation and drafting process. TMT/Directors Meetings will devote standing item to IDP/Budget preparation during preparation and drafting process. IDP/Budget Steering Committee members will also play a leading role in the revisions to programmes, working closely with their directorates.

The IDP Stakeholder Forum is also required in terms of legislation to bring in external stakeholders at key decision points in the process, who have a statutory right to be involved in the decision-making process around the IDP. Wards will be making their proposals and inputs through the Area-based planning process, but will also form part of the Stakeholder Forum. Programme Task Teams will be established by respective directorates involving external stakeholders in the review of development programmes.

5.1.1 IDP/Budget Steering Committee

The IDP/Budget Steering Committee (SC) is a strategic, political and technical working team making political and technical decisions and inputs that must ensure a smooth compilation and implementation of the IDP. The IDP SC and the Stakeholder Forum will be constituted for the preparation of the IDP process. As part of the IDP and budget formulation process, the Steering Committee which supports the Municipal Manager, the Manager: IDP and the Budget Office should remain as follows:

Institutional composition:

- The IDP/Budget Steering Committee will be chaired by the Mayor and in his absence, a delegated MAYCO councillor.
- Members of the IDP/Budget Steering Committee will consist of MAYCO, Speaker, TMT Manager IDP/PMS and Manager Budget.
- MAYCO and Directors, Manager IDP/PMS and Manager Budget will be responsible for the preparation of the IDP, PMS and Budget and any other members as the Mayor may deem fit.
- Secretariat will be provided by the Corporate Services Administration Services.

5.1.2 Terms of Reference for the IDP/Budget Steering Committee

The terms of reference for the IDP and Budget Steering Committee are as follows:

- Facilitate terms of reference for the various planning activities associated with the IDP and Budget;
- Commission studies necessary as may be required for the successful compilation of the IDP;
- Processes and documents:
- Inputs from sub-committee/s, study teams;
- Inputs from provincial sector departments and support providers;
- Processes, summarise and document outputs;
- Makes content and technical recommendations;
- Prepare, facilitate and documents meetings;
- Facilitate control mechanisms regarding the effective and efficient implementation, monitoring and amendment of the IDP and Budget;

- Ensure coordination and integration of sectoral plans and projects; and
- Ensure that the municipal budget is in line with the IDP.

5.1.3 Municipal Manager

As a head administration, the Municipal Manager is responsible and accountable for the implementation of the municipality's IDP, and the monitoring of progress with implementation of the plan. He is also the responsible person for championing the integrated development planning process.

5.1.4 Managers: IDP and Organisational Performance

Amongst others, the following responsibilities have been allocated to the Manager: IDP /Performance Management for the IDP Process:

- Ensure that the Process Plan is finalised and adopted by Council;
- Adjust the IDP according to the proposals of the MEC;
- Identify additional role-players to sit on the IDP Stakeholder Forum;
- Ensure the continuous participation of role players;
- Monitor the participation of role players;
- Ensure appropriate procedures are followed;
- Ensure documentation is prepared properly;
- Carry out the day-to-day management of the IDP process;
- Respond to comments and enquiries;
- Ensure alignment of the IDP with other IDPs within the District Municipality;
- Co-ordinate the inclusion of Sector Plans into the IDP documentation;
- Co-ordinate the inclusion of the Performance Management System (PMS) / SDBIP into the IDP;
- Submit the approved review IDP to the relevant authorities.

5.2. IDP and Budget Forum

5.2.1 Composition of IDP and Budget Forum

The IDP and Budget Forum will facilitate and co-ordinate participation as part of the preparation phase of the IDP and will continue its functions throughout the annual IDP Review processes. The proposed composition of the IDP and Budget Forum is potentially municipal stakeholders.

5.2.2 Terms of Reference for the IDP Representative Forum

The terms of reference for the IDP Representative Forum are as follows:

- Represent the interest of the municipality's constituency in the IDP process;
- Form a structures link between the municipality and representatives of the public;
- Provide an organisational mechanism for discussion, negotiation and decision making between the stakeholders including municipal government;

- Ensure communication between all the stakeholder representatives including the municipal;
- Monitor the performance of the planning and implementation process;
- Integrate and prioritise issues, strategies, projects and programmes and identify budget requirements; and
- Monitor the performance of planning and implementation process.

5.3 IDP Task Team

5.3.1 Composition of IDP Task Team

There will be an IDP Task Team to drive the preparation and development of the IDP. This should ideally be a small technical team constituted by relevant municipal and line function officials. The IDP Task Team should be chaired by the Municipal Manager and/or a Director and the secretary should be the Manager: IDP / PMS. It will work full-time for the period of the preparation of the IDP, and should meet formally with the Municipal Manager and/or the Director on a weekly basis. Additional project teams may be needed to develop specific projects.

5.3.2 Terms of Reference for the IDP Task Team

The IDP Task Team will be involved in the management, discussion of the contents of IDP by:

- Providing inputs related to the various planning steps;
- Summarising/digesting/processing inputs from participation process;
- Providing technical and sector related expertise and information; and
- Preparing draft projects proposals.

5.4 Roles and Responsibilities of Different Spheres of Government in the IDP Process

The responsibility to prepare and adopt the IDP lies with Knysna Local Municipality Local Municipality. However IDP is seen as a key measure to identify and respond timeously and effectively to local developmental challenges and priorities, in a manner that leverages involvement and responses of all stakeholders including across sectoral basis and contributions by the district, provincial and national governments. It is therefore required for all stakeholders to be fully aware of their own responsibilities and of other role-players' responsibilities to ensure a smooth and well organised the planning process.

In order to ensure that there is a clear understanding of all required roles and responsibilities between the three spheres, the following are highlighted:

SPHERE OF GOVERNMENT	ROLES & RESPONSIBILITIES
LOCAL	
Local Municipality and Entity	Prepare the IDP
	Adopt the IDP
District Municipality (GARDEN ROUTE)	Prepare the District IDP
	Adopt the District IDP
	Facilitate District Guidelines on Growth and Development
PROVINCIAL	
Department Local Government, Western Cape Provincial Government	
	Coordinate training
	Provide financial support
	Provide general IDP Guidance
	Monitor municipal process
	Facilitate alignment of IDPs with sector department policies and programmes
Sector Departments	Provide relevant information on sector department's policies, programmes and budgets
	Contribute sector expertise and technical knowledge to the formulation of municipal policies and strategies
	Be guided by municipal IDPs in the allocation of resources at the local level
NATIONAL	
Department of Cooperative Governance and Traditional Affairs	Issue legislation and policy in support of IDP's
	Issue Integrated Development Planning Guidelines

	Establish a Planning and Implementation Management Support System
	Provide a national training framework
	Provide financial assistance
Sector Departments	Provide relevant information on sector department's policies, programmes and budgets
	Contribute sector expertise and technical knowledge to the formulation of municipal policies and strategies
	Be guided by municipal IDP's in the allocation of resources at the local level

SECTION SIX: ROLES, RESPONSIBILITIES AND KEY ACTIVITIES

6.1 Role Players

The Municipality will confirm the identification of the following role players in the IDP and Budget processes:

Internal Role-players

- Council and the MAYCO ;
- Nominated Councillors;
- Mayor;
- Municipal Manager;
- Manager: IDP / PMS;
- IDP/Budget Steering Committee; and
- Stakeholder Forum/Civil Society.

External Role –players

1. Relevant Government Departments;
2. Municipal officials;
3. Representative Forum / Civil Society.

6.2 Key Activities

Following are a summary of the key activities to take place in terms of the IDP, Budget and PMS for the new term of IDP Process:

MONTH	ACTIVITIES			
	IDP	PMS	BUDGET	
JULY	Finalise, publicise and submit 2022/2023 to the National Treasury, WCPG for approval by the Minister Local Government .	Municipal Manager submits draft service delivery and implementation plan to Mayor no later than 14 days after approval of budget.	Mayor and Council / Municipal Administration and Mayor begins planning for next three –year budget in accordance with co-ordination role of budget process, MFMA s 53.	Municipal administration and senior officials MM of NLM begins planning for next three year budget, MFMA sec 68,77
	District adopts a binding framework for IDP in the area as a whole ensuring alignment of the IDP process of the district and various local municipalities, MSA s 27.	Mayor ensures that service delivery and budget implementation plan is approved within 28 days of approval of budget.	Planning includes review of the previous year budget process and completion of the Budget Evaluation Checklist forwarded to Knysna Local municipality by National Treasury.	MM and senior officials of NLM review options and contracts for service delivery MSA sec 76-81
	Development of IDP Time Schedule that guides the planning, drafting, adoption and review of the plan, MSA s 28.	Mayor to ensure that the following is made public within 14 days of approval of service delivery and budget implementation plan.		
		Municipal Manager submits draft performance agreements to Mayor no later than 14 days after approval of budget, s 69 of the MFMA and s 57 of the MSA.		
AUG			Receive Inputs from Departments: Motivation for Roll-Overs from 2022/2023.	Departments

MONTH	ACTIVITIES			
			Approval of Roll-Overs (Adjustment Budget).	Council
			Approval of Budget time.	Council
			Submission of Unspent Conditional Grants of 2021/2022 to NT	Finance
September		Mayor to ensure that performance agreements comply with MFMA to promote sound financial management.	Mayor tables in Council a Process Plan outlining key deadlines for: preparing, tabling and approving the budget, developing and/or reviewing the IDP (as per s 34 of MSA) and budget related policies and consultation processes at least 10 months before the start of the budget year, MFMA s 21,22, 23; MSA s 34, Ch 4 (as amended).	Municipal Manager submit NLM's AFS to Auditor-General by 31 August, MFMA Sec 126(1)(a)
		Mayor to ensure that agreements are linked to the measurable performance objectives approved with the budget and service delivery implementation plan.		

MONTH	ACTIVITIES			
	Give notice to local community of particulars of the Process Plan, MSA s 28. (The advert will released in the first week of September).	Mayor to ensure that agreements are linked to the measurable performance objectives approved with budget and service delivery implementation plan.	Mayor establishes committees and consultation forums for the budget process.	
	IDP preparation process Consider proposals received from MEC, if any, MSA s 32.	Mayor to ensure performance agreements submitted to Council and MEC for local government in the province.		
	Consider comments received from Councillors, Ward Committees and other various role-players during the 2022-23 IDP Screening Session and IDP/Budget Workshop.	Quarterly SDBIP, MPPR Reg. 14.		
September	IDP Preparation Process	Auditor General audit of performance measures	Council through the IDP process determines five -year strategic objectives for service delivery and development for next three-year budgets including review of provincial and national government sector and strategic plans.	Municipal Manager submit NLM consolidated AFS to Auditor-General by 30 September, MFMA Sec 126(1) (b).

MONTH	ACTIVITIES			
	Facilitate a self-assessment Dialogue to review performance of the municipality and determine shortcomings and weaknesses.			
	Integration of information into IDP where necessary including incorporation of Service Plans from Directorates.			Budget offices of municipality determine revenue projections and proposed rate and service charges and drafts initial allocations to functions and departments for the next financial year after taking into account strategic objectives.
	Evaluate status of KLM Spatial Development Framework			
	Updating and review of the strategic elements of the SDF in line with the MAYCO focus.			Engages with Provincial and National sector departments on sector specific programmes for alignment with municipality's plans (schools, libraries, clinics, water, electricity, roads, etc).
	Public consultation in terms of CBP continues.			
	Refinement of Statutory Plans initiated by directorates			

MONTH	ACTIVITIES			
	Commence a process of IDP Review and service delivery mechanisms MSA 34(a) 77 (f)			
October	Continue with integration of information from Service Plans into the IDP.	Appointment of the Audit Committee, MPPR Reg. 14.	Starting of Budget Process	Municipal Manager does initial review of national policies and budget plans and potential price increases of bulk resources with function and department officials, MFMA s 35, 36, 42; MTBPS Budget Office
	Initiate CBP Community-based planning launched. Engage in a process of developing ward plans in line with MTREF.		Indication of Increase in Tariffs NEW FY	MAYCO Assisted by IDP/Budget Steering Committee
	Updating and review of the strategic elements of the SDF in line with the MAYCO focus.		Distribute Capital & Operating Budget Files to Departments	Manager Budget Office

MONTH	ACTIVITIES			
			Submit Quarterly Report to the Council on the Implementation of the Budget and the Financial State of Affairs of the Municipality	Mayor
			Revision of IDP Completed	Manager IDP/PMS
			Receive inputs from Departments: Capital Budget (Emanating from Revised (IDP) Amended	Departments
November	Continue with integration of information from Service Plans, Statutory Plans into the IDP.		Receive Inputs from Departments: Operating Budget (Emanating from Revised IDP)	Municipal Manager reviews and drafts initial changes to IDP, MSA s 34. Departments
	Initiate the process of reviewing Spatial Development Framework.		Identifying Projects to Comply with Strategic Objectives	Councillors and Management
	Confirming municipal priority areas for the next 5 years.		Assessing Affordability	Finance
	High level programmes from all wards integrated into IDP.		Availability of Own funds	Finance

MONTH	ACTIVITIES			
	Refining municipal Strategies, Objectives, KPA's, KPI's and targets so as to influence the budget.		Affordability of New Loans to Fund Projects	Finance
	Set and agree on three IDP priority projects.		Possible Grant Funding to Fund Projects	Finance
	Stakeholder Forum to refine, amend and/or confirm the above.			
December	Institutional plan refined to deliver on the municipal strategy.	Compile annual report, MFMA s 121	Council finalises tariff (rates and service charges) policies for next financial year, MSA s 74, 75.	Audit report returned to the Municipal Manager by 31 December, MFMA s 133(2).
	Horizontal and vertical alignment with District, Province and other stakeholders begins.		Personnel Budget Completed	On receipt of the audit report KLM must address issues raised by the Auditor-General and prepare action plans to address issues and include these in the annual report, MFMA s 131(1). Finance
	Directorates identifying programmes and projects with external stakeholders.			Submit annual report to the Municipal Manager by 31 December, MFMA s 127 (1).

MONTH	ACTIVITIES			
	Financial Plan and Capital Investment Plan are developed.			
January	Horizontal and vertical alignment with District, Province and other stakeholders continues.	Mayor tables annual reports of KLM for 2021/2022, MFMA Sect 127(2).	Receive Inputs from Departments: Final Adjustment Budget	Accounting officer reviews proposed national and provincial allocations to municipality for incorporation into the draft budget for tabling. (Proposed national and provincial allocations for three years must be available by 20 Jan), MFMA s 36. Departments
	Directorates identifying programmes and projects with external stakeholders.	Make public annual report and invite community inputs into report (MFMA s 127 & MSA s 21a).	Section 72 Mid-year budget and Performance Assessments	Immediately after the annual report is tabled, the Municipal Manager make public annual report and invite community inputs into report (MFMA s 127 & MSA s 21a). Municipal Manager
	Capital Investment and Financial Plans refined.	s 57 Managers' quarterly assessments (for second quarter of 2022/23).	Submission of Mid-Year Budget and Performance Assessments to NT and PT	Municipal Manager

MONTH	ACTIVITIES			
		Quarterly SDBIP, MPPR Reg. 14	Publication of Mid-Year Budget and Performance Assessment	Municipal Manager
			Mayor to Submit section 72 Report to Council	Mayor
			Determine Preliminary Tariffs	Manager Revenue
			Revision of Budget Related Policies	Finance
FEBRUARY	Horizontal and vertical alignment with District, Province and other stakeholders continues.	Quarterly Audit Committee meeting (for the second quarter of 09/10, MFMA Sect 166 & MPPR Reg. 14(3)(a))		Municipal Manager finalises and submits to Mayor proposed budgets and plans for next three-year budgets taking into account the recent mid-year review and any corrective measures proposed as part of the oversight report for the previous years audited financial statements and annual report.
	Directorates identifying programmes and projects with external stakeholders.	Submit annual report to Auditor General, MECs for Local Government and Treasury, MFMA s 127.	Finalising Multi-Year Budgets	Finance
	Capital Investment and Financial Plans refined.		Approval of Final Adjustment Budget	Council

MARCH	Prepare Service Delivery Budget Implementation Plans linked to the IDP Strategies, objectives KPI's and targets	Council to consider and adopt an oversight report, due by 31 March, MFMA Sec 129(1).	Mayor tables municipality budget, budgets of entities, resolutions, plans, and proposed revisions to IDP at least 90 days before start of budget year, MFMA s 16, 22, 23, 87; MSA s 34.	Municipal Manager publishes tabled budget, plans, and proposed revisions to IDP, invites local community comment and submits to NT, PT and others as prescribed MFMA s 22 & 37; MSA Ch 4 (as amended).
	Finalise Capital Investment Plan and Financial Plans.	Set performance objectives for revenue for each budget vote, MFMA s 17.	Draft Multi-Year Budgets Tabled before Council	Mayor
	Conclusion of Service Plans and integration into the IDP document.	Refinement of Municipal Strategies, Objectives, KPA's, KPI's, targets, and inclusion into 2023/24 IDP report.	Proposed Amendments to IDP following Annual IDP Review Process Tabled before Council	Mayor
	Tabling of draft IDP, budget, plans and related policies with resolutions before Council	s 57 Managers' Quarterly Performance Assessments		
	Publication of the tabled IDP, budget, plans and invitation to local community and stakeholders for comments and inputs and submission to National and Provincial treasuries.	Publicise Annual Oversight Report within seven day of adoption, MFMA Sec 129(3) and s 21A MSA.		

MONTH	ACTIVITIES			
APRIL	Portfolio Committee and Council Hearings launched through series of public representations by community and stakeholders on the IDP and Budget.	Within seven days of adoption of Oversight Report submit to the Provincial Legislature/MEC Local Government the annual report of NLM and the oversight reports on those annual reports, MFMA Sec 132(2).	Consultation with national and provincial treasuries and finalise service plans for water, sanitation, electricity etc, MFMA s 21.	Accounting officer assists the Mayor in revising budget documentation in accordance with consultative processes and taking into account the results from the third quarterly review of the current year.
	Prepare service delivery and budget implementation plans linked to the IDP strategies, objectives, KPI's and targets.	Quarterly SDBIP Report, MPPR Reg. 14	Submission of Draft Multi-Year Budgets to NT and PT	Municipal Manager
		Quarterly Audit Committee, MFMA s 166 & MPPR Reg. 14(3) (a).	Publication of Draft Multi-Year Budgets and Invite Local Community to Submit Representations in Connection with the Budget	Municipal Manager
			Submit Quarterly Report to the Council on the implementation of the Budget and the Financial State of Affairs of the Municipality	Mayor

MONTH	ACTIVITIES			
MAY	IDP Budget Conference to consider the revisions and amendments to the IDP and budget.	Annual review of organisational KPI's, MPPR Reg 11.	Public hearings on the budget, and council debate. Council consider views of the local community, NT, PT, other provincial and national organs of state Mayor to be provided with an opportunity to respond to submissions during consultation and table amendments for council consideration. Council to consider approval of budget and plans at least 30 days before start of budget year, MFMA s 23, 24; MSA Ch 4 (as amended).	Municipal Manager assists the Mayor in preparing the final budget documentation for consideration for approval at least 30 days before the start of the budget year taking into account consultative processes and any other new information of a material nature.
	Consultative Workshop with the entire Council on the final draft IDP and the budget.		Approval of Draft Multi-Year Budgets and any Changes to the IDP	Council
	MAYCO recommends adoption of the IDP to Council.	Review annual organisational performance targets, MPPR Reg 11.		
	Council sitting to approve IDP, budget and related policies.			
JUNE	Submission of draft SDBIP and Annual Performance Agreements by Municipal Manager to the Mayor for consideration.	Community input into organisation KPI's and targets.	Council must approve annual budget by resolution, setting taxes and tariffs, approving changes to IDP and budget related policies, approving measurable performance objectives for revenue by	Municipal Manager submits to the Mayor no later than 14 days after approval of the budget a draft of the SDBIP and annual performance agreements required by

			source and expenditure by vote before start of budget year, MFMA s 16, 24, 26, 53.	s 57(1)(b) of the MSA and MFMA s 69; MSA s 57.
	Mayor approves SDBIP and annual performance agreements for Municipal Manager and Senior managers (s 57).			
			Mayor must approve SDBIP within 28 days after approval of the budget and ensure that annual performance contracts are concluded in accordance with s 57(2) of the MSA.	Municipal Manager publishes adopted budget and plans MFMA s 75, 87.
			Mayor to ensure that the annual performance agreements are linked to the measurable performance objectives approved with the budget and SDBIP.	
			The Mayor submits the approved SDBIP and performance agreements to, MEC for local government and makes public within 14 days after approval, MFMA s 53; MSA s 38-45, 57(2).	
			Council must finalise a system of delegations, MFMA s 59, 79, 82; MSA s 59-65.	

MONTH	ACTIVITIES			
JULY			SDBIP's are made public	Mayor
			Implementation of Budgets and SDBIP's	Municipal Manager
			Submit Preliminary Quarterly Report to the Council on the Implementation of the Budget and the Financial State of Affairs of the Municipality.	Mayor

6.2.2 Key IDP and budget time schedule of events

IDP PHASES	DELIVERABLE AND PROCESS MANAGEMENT	RESPONSIBLE	.....OUTPUT...	.....DATES...	STATUS
	Development of IDP/Budget Time Schedule	IDP		AUGUST	
	TMT to consider Time Schedule	IDP			
Preparation Phase	Draft Time Schedule Plan to IDP and Budget Steering Committee/MAYCO	IDP	Approved IDP & budget Time Schedule		
	Tabling of the IDP and Time Schedule to Council	MAYOR (EM)			
	Advertisement of IDP and Budget Time Schedule	IDP		SEPTEMBER	
	1 st Public Consultation Sessions with all communities in Knysna, Rheenendal and Karatara and Sedgfield. One week per town inclusive of stakeholders.	IDP	Facilitate consultation sessions	OCTOBER – NOVEMBER	
	Committees and consultation process for budget process	MAYCO IDP & FINANCE	Determine and assess the current level of development and what are the emerging challenges, opportunities and priority issues	DECEMBER	
Analysis Phase	Briefing session with IDP/Budget Steering Committee	CFO & MM			
	EMT to submit budget inputs on capital projects	MM			

IDP PHASES	DELIVERABLE AND PROCESS MANAGEMENT	RESPONSIBLE	.....OUTPUT...	.....DATES...	STATUS
	One day self-assessment dialogue with EMT, MAYCO and Councillors	MM		JANUARY	
	Current status of the implementation progress	MM			
	Consideration, review and inclusion of any relevant and new information	IDP			
	IDP/Budget Steering Committee to review emerging issues/changes and to prioritize IDP and budget items	EM, IDP & FINANCE			
Strategy Phase	Refining municipal Strategies, Objectives, KPA's, KPI's and targets so as to influence the budget	EM	<p>Develop and/or refine objective for priority issues</p> <p>Determine the programmes to achieve strategic intent.</p> <p>Develop organisational scorecard.</p>	FEBRUARY	
	Initiate Public Participation process in line with MTREF	OFFICE OF THE SPEAKER			
	MAYCO Lekgotla to confirm IDP, SDBIP and Budget priorities	EM			
	MAYCO approves municipal objectives, strategies, KPIs and targets	EM			
IDP PHASES	DELIVERABLE AND PROCESS MANAGEMENT	RESPONSIBLE	.....OUTPUT...	.....DATES...	STATUS

	Review tariffs and budget policies	CFO		February	
	Set and agree on IDP priority programme/projects	EM and MM	Identify projects and set output, target Agree on Spatial location of the projects		
	Review and align National and Provincial allocation for inclusion in the draft IDP and MTREF budget	MM	Develop Draft budget		
Project Phase	Draft MTREF budget developed	CFO			
	Directorates develop draft SDBIP and present to Portfolio Committees	PMS			
	Institutional plan refined to deliver on the municipal strategy	MM		March	
	Directorates identifying programmes and projects with external stakeholders	EMT			
Integration Phase	Integration of sector plans and institutional programmes	IDP	Integrate and align with sector plans Incorporate programmes and projects into IDP		
	Horizontal and vertical alignment with District, Province and other stakeholders	EMT			
	Financial plan and capital investment plan are developed	CFO			
	Presentation of service plans and integration into the IDP document to MAYCO	MM			
IDP PHASES	DELIVERABLE AND PROCESS MANAGEMENT	RESPONSIBLE	.....OUTPUT...	.....DATES...	STATUS

	Tabling of the Draft IDP including proposed revisions and MTREF Budget and related resolutions – NLM	EM	Table Draft Amended, Amended IDP, Budget and SDBIP	MARCH	
	Submission of draft IDP and MTREF to MECs Treasury and Cooperative Governance, Traditional and Human Settlements, and National	IDP & BUDGET OFFICE			
Approval Phase	Public participation process including hearings on Draft IDP and Budget	IDP		END-MARCH – APRIL	
	IDP Budget Lekgotla	IDP		APRIL	
	Special Council considers submissions, representations and recommendations from hearings. Mayor to be provided with an opportunity to respond to submissions during consultation and table amendments for Council consideration.	COUNCIL			
	Mayor with support of MAYCO to recommend approval by Council after considering inputs from Council and all sectors	EM			
	Council meeting to approve MTREF budget by resolution, setting taxes and tariffs, approving changes to IDP and budget related policies, approving measurable performance objectives for revenue by source and expenditure by vote before start of budget year	COUNCIL		END MAY	
	Publication of approved Amended, Amended 2023/2024 IDP and budget on the website and in local newspapers	IDP		JUNE	
	Compilation and submission of draft 2023-24 SDBIP and annual performance agreements by Municipal Manager to the Mayor	MM			
IDP PHASES	DELIVERABLE AND PROCESS MANAGEMENT	RESPONSIBLE	.....OUTPUT...	.....DATES...	STATUS

	<p>Mayor approves the 2023/24 SDBIP and annual performance agreements of the City Manager and senior managers within 28 days after the approval of IDP and budget. Mayor ensures that the annual performance agreements are linked to the measurable performance objectives approved with the budget and SDBIP.</p>	<p>MAYOR</p>		<p>JUNE</p>	
	<p>The Mayor submits the approved SDBIP and performance agreements to Council, MEC for Local Government and makes public within 14 days after approval.</p>	<p>COUNCIL, MAYOR, MM & IDP</p>			