



**BREED VALLEY**  
MUNICIPALITY • MUNISIPALITEIT • UMASIPALA

# **DRAFT 5<sup>th</sup> GENERATION IDP PROCESS PLAN**

A GUIDELINE INFORMING THE PROCESS OF PLANNING, DRAFTING, ADOPTING AND  
REVIEWING THE IDP OF BREED VALLEY MUNICIPALITY

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## **1. Introduction**

The Integrated Development Plan (IDP) is a municipality's principal strategic plan that deals with the most critical development needs of the municipal area (external focus) as well as the most critical governance needs of the organisation (internal focus). The IDP:

- ⇒ is adopted by Council within one year after a municipal election and remains in force for the Council's elected term (a period of five years);
- ⇒ is reviewed or amended annually in consultation with the local community as well as interested organs of state and stakeholders/role-players;
- ⇒ guides and informs all decisions/actions with regard to planning, management & development;
- ⇒ forms the framework and basis for the municipality's medium-term expenditure framework, annual budgets and performance management system; and
- ⇒ seeks to promote integration and coordination of actions across sectors and spheres of government

The **IDP Process Plan** is the first step / milestone of the newly elected Council that paves the way and articulates the progressive activities and processes which the municipality will embark on in drafting, adopting and reviewing its 5<sup>th</sup> Generation IDP for the implementation period 2022 - 2027. The process plan enhances integration and alignment between the IDP and budget, thereby ensuring the development of a budget that is responsive to the overarching strategic intent of the municipality. It fulfils the role of a business plan or an operational framework for the IDP process outlining the way the IDP process will be undertaken. The IDP Process Plan incorporates all municipal planning, budgeting, performance management, performance reporting and public and stakeholder engagement processes. This plan must include 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;
- ⇒ An indication of the organisational arrangements for the IDP process;
- ⇒ Binding plans and planning requirements, i.e. policy and legislation; and
- ⇒ Mechanisms and procedures for vertical and horizontal alignment.

The process encompasses the involvement of a range of role-players and stakeholders (both internal and external), therefore it requires accurate logistical planning and arrangements of engagement sessions to ensure that the process is implemented in accordance with the approved schedule. It is important to bear in mind that the end result of the IDP process is not the drafting of the IDP document, but the actual implementation of projects and programmes which will ultimately create a conducive environment wherein all people can prosper social and economically. It should further be noted that the process plan remains a dynamic document, thus, activities may be amended and/or altered as the need dictates.

## **2. Integrated Development Planning**

Integrated Development Planning is an elaborate and collaborative planning process which produces a strategic plan designed to guide municipalities and their entities to systematically eradicate service delivery backlogs; encourage socio-economic development; preserve and conserve the natural environment; address spatial disparities of development and deliver on the agreed priorities which are translated into projects with clearly defined outputs and targets within a five-year planning cycle. Due to the participatory nature of the integrated development planning process, municipalities often spend approximately 6 – 9 months to complete an IDP.

The Municipal Systems Act (32 of 2000), hereafter referred to as the MSA, stipulates that all municipalities (i.e. Metros, District Municipalities and Local Municipalities) must undertake an integrated development planning process to produce IDPs. As the IDP is a legislated requirement, in terms of section 25 (1) of the MSA amongst others, it has a legal status and therefore supersedes all other plans that guide development at local government level.

The MSA further stipulates that each newly elected Council, that comes into office after the local government elections, must adopt an IDP applicable to their term of office (5-year period). Apart from drafting and adopting an entirely new IDP linked to its term of office, a newly elected Council has, in terms of section 25 (3) of the MSA, the prerogative to adopt the IDP of its predecessor. It may do so with or without amendments. Should this be considered, must consider adopting the predecessor's IDP **without** or **with** amendments respectively:

- ⇒ Section 25 (3) (a) – “A newly elected municipal council may, within the prescribed period referred to in subsection (1), adopt the IDP of its predecessor, but before taking a decision it must comply with section 29 (1) (b) (i), (c) and (d).”
- ⇒ Section 25 (3) (b) – “A newly elected municipal council that adopts the IDP of its predecessor **with amendments**, must effect the amendments in accordance with the process referred to in section 34 (b).”

Based on the above, it is recommended that Council proceeds with the compilation of a new 5<sup>th</sup> Generation IDP. The subsequent activities relating to this process, is encapsulated in section 8 below

## 2.1 IDP Content

The core components of the IDP is encapsulated in the MSA (Chapter 5, section 26), read together with regulation 2 of the Local Government Municipal Planning and Performance Management Regulations, hereafter referred to as the MP&PMR. These provisions are depicted below:

### Section 26 of the MSA:

“An IDP 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 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.”

### Regulation 2 of the MP&PMR:

(1) “A municipality's IDP must at least identify-

- (a) the institutional framework, which must include an organogram, required for-
  - (i) the implementation of the IDP; and
  - (ii) addressing the municipality's internal transformation needs, as informed by the strategies and programmes set out in the IDP;
- (b) any investment initiatives in the municipality;
- (c) any development initiatives in the municipality, including infrastructure, physical, social, economic and institutional development;
- (d) all known projects, plans and programmes to be implemented within the municipality by any organ of state; and
- (e) the key performance indicators set by the municipality.

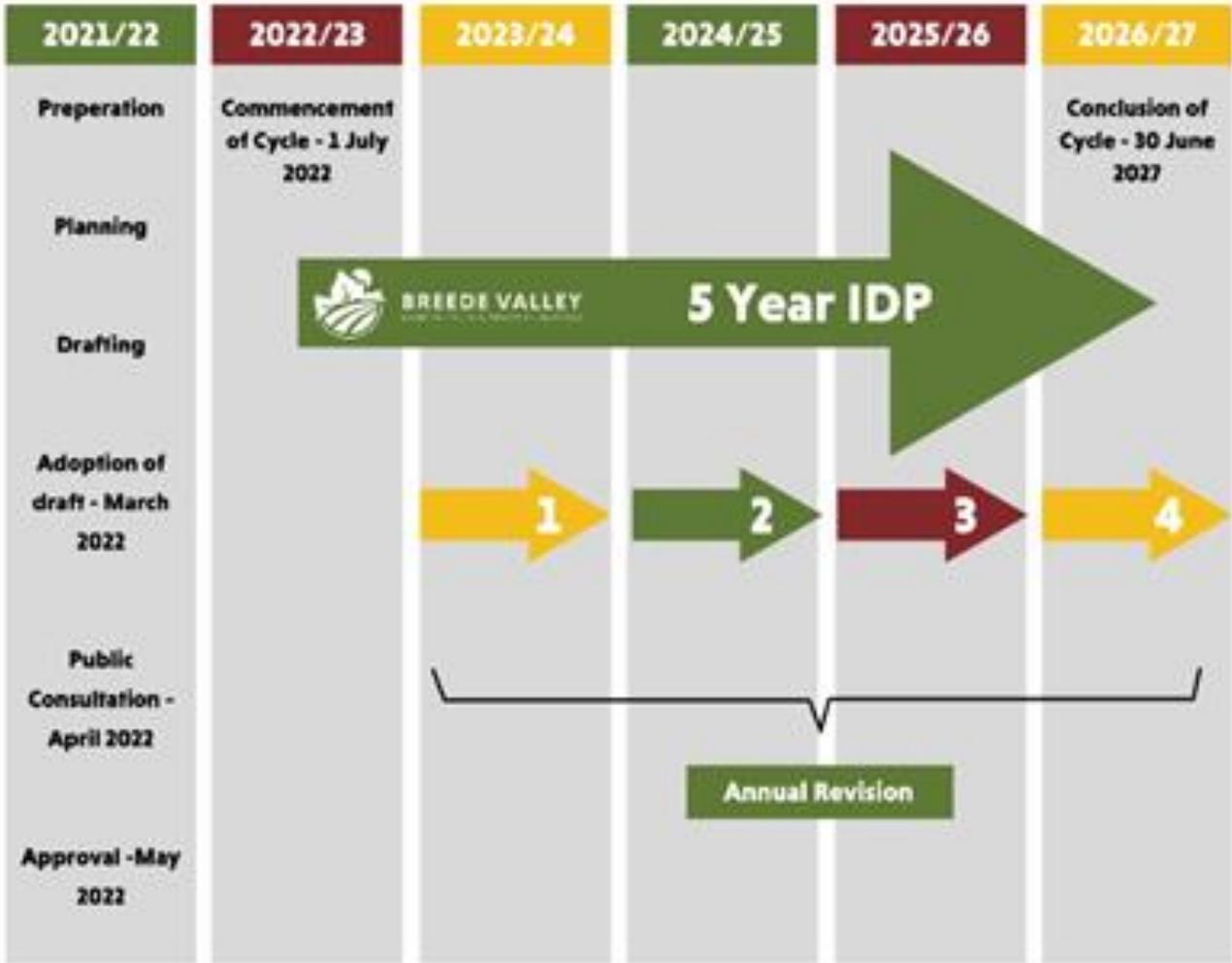
(2) An IDP may-

- (a) have attached to it maps, statistics and other appropriate documents; or
- (b) refer to maps, statistics and other appropriate documents that are not attached, provided they are open for public inspection at the Offices of the municipality in question.

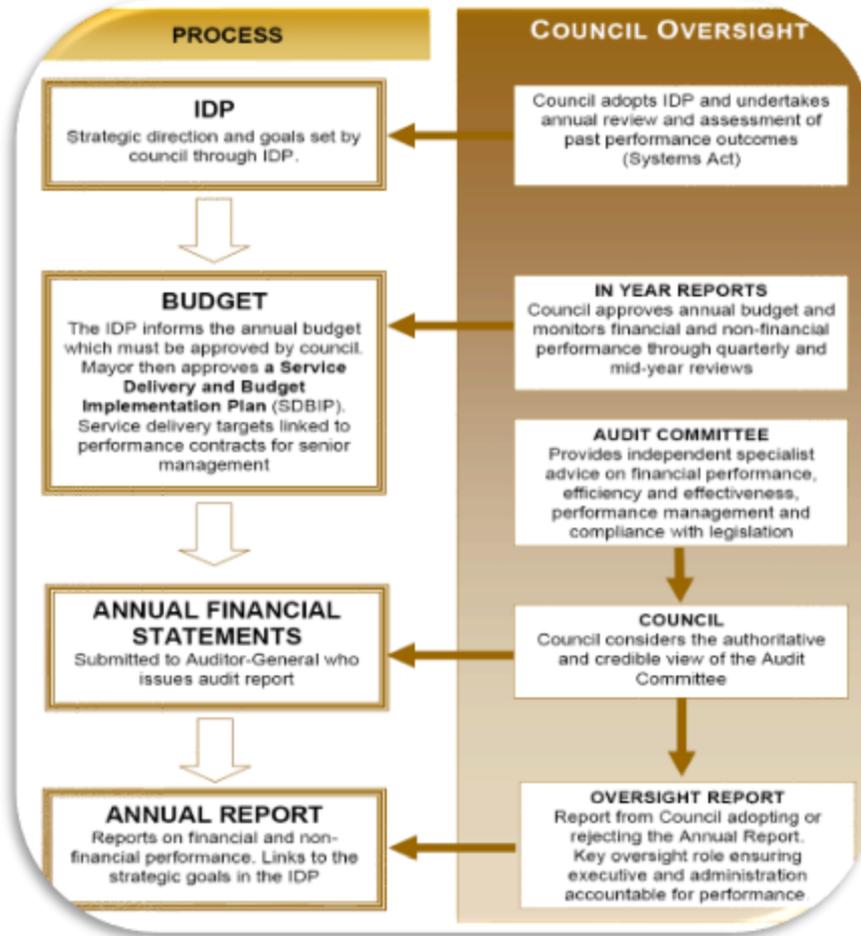
- (3) *A financial plan reflected in a municipality's IDP must at least-*
- (a) *include the budget projection required by section 26(h) of the Act;*
  - (b) *indicate the financial resources that are available for capital project developments and operational expenditure; and*
  - (c) *include a financial strategy that defines sound financial management and expenditure control, as well as ways and means of increasing revenues and external funding for the municipality and its development priorities and objectives, which strategy may address the following-*
    - (i) *Revenue raising strategies;*
    - (ii) *asset management strategies;*
    - (iii) *financial management strategies;*
    - (iv) *capital financing strategies;*
    - (v) *operational financing strategies; and*
    - (vi) *strategies that would enhance cost-effectiveness.*
- (4) *A spatial development framework reflected in a municipality's IDP must-*
- (a) *give effect to the principles contained in Chapter 1 of the Development Facilitation Act, 1995 (Act No. 67 of 1995);*
  - (b) *set out objectives that reflect the desired spatial form of the municipality;*
  - (c) *contain strategies and policies regarding the manner in which to achieve the objectives referred to in paragraph (b), which strategies and policies must-*
    - (i) *indicate desired patterns of land use within the municipality;*
    - (ii) *address the spatial reconstruction of the municipality; and*
    - (iii) *provide strategic guidance in respect of the location and nature of development within the municipality;*
  - (d) *set out basic guidelines for a land use management system in the municipality;*
  - (e) *set out a capital investment framework for the municipality's development programs;*
  - (f) *contain a strategic assessment of the environmental impact of the spatial development framework;*
  - (g) *identify programs and projects for the development of land within the municipality;*
  - (h) *be aligned with the spatial development frameworks reflected in the IDPs of neighbouring municipalities; and*
  - (i) *provide a visual representation of the desired spatial form of the municipality, which representation-*
    - (i) *must indicate where public and private land development and infrastructure investment should take place;*
    - (ii) *must indicate desired or undesired utilisation of space in a particular area;*
    - (iii) *may delineate the urban edge;*
    - (iv) *must identify areas where strategic intervention is required; and*
    - (v) *must indicate areas where priority spending is required.*

**2.2 Five Year IDP Cycle**

The figure below, depicts the 5-year IDP cycle and should be read together with sub-section 2.3 below.



The figure below, depicts the in-year review process and synergy between the IDP and budget in more detail. It should be read together with sub-section 2.3 below.



**2.3 Drafting & Reviewing the IDP – Phases & Processes**

The table below summarises the important activities and deliverables to be considered during the phases of the process of drafting and reviewing the IDP annually.

<b>ACTIVITY</b>	<b>ANTICIPATED OUTPUT</b>	<b>ACTIONS (GUIDELINE)</b>
<b>ANALYSIS</b>		
<b>External Analysis</b>	<ul style="list-style-type: none"> <li>⇒ Assessment of existing level of development</li> <li>⇒ Identification of priority issues/problems</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Review sector plans and prioritise implementation of sector plan recommendations</li> <li>⇒ Review the Spatial Development Framework</li> <li>⇒ Consider socio-economic data and analyses relating to BVM</li> <li>⇒ Community Satisfaction Surveys</li> <li>⇒ Community Needs Analysis / Input</li> </ul>
<b>Internal Analysis</b>	<ul style="list-style-type: none"> <li>⇒ Information on causes of priority issues/problems</li> <li>⇒ Information on available resources</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Review Long Term Financial Plan</li> <li>⇒ Develop/review organisational SWOT analysis / Identify Opportunities and Critical Challenges</li> <li>⇒ 5<sup>th</sup> Generation IDP Needs Analysis</li> <li>⇒ Develop/review Ward Operational Plans</li> <li>⇒ Review minimum service levels/standards</li> </ul>
<b>STRATEGY</b>		
<b>Organisational Strategy Review</b>	<ul style="list-style-type: none"> <li>⇒ Formulating a vision &amp; mission statement</li> <li>⇒ Developing objectives &amp; strategies</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Review 5<sup>th</sup> generation organisational strategy, amend, draft and adopt new strategy. Council and Management discuss strategic issues such as vision and mission, future directions, strategic goals and objectives, key performance indicators and targets for each strategic objective.</li> </ul>
<b>Strategic Planning Session</b>	<ul style="list-style-type: none"> <li>⇒ Identification of subsequent projects</li> </ul>	<ul style="list-style-type: none"> <li>⇒ Council and Management considered external and internal analysis and strategies around 5-year development priorities and operational strategies (programmes, projects, activities and actions)</li> </ul>
<b>PROJECTS</b>		

<p align="center"><b>Project and Programme Identification</b></p>	<p>⇒ Design and specification of projects earmarked for implementation &amp; linked to the priority issues and the objectives identified (i.e. performance indicators; project outputs, targets, &amp; location; project related activities and time schedules; and project costs &amp; budget estimates.</p>	<p>⇒ Management consider external and internal needs analysis and outcomes of Strategic Planning Session and identify projects and develop project business plans.</p> <p>⇒ <b>Mandatory Projects</b> - Upgrade and Development of New Infrastructure Projects directly linked to basic service delivery (Water / Electricity / Sanitation / Refuse Removal)</p> <p>⇒ <b>Community Mandated Projects</b> – Projects earmarked to stimulate socio-economic upliftment within communities and beautification and development of residential areas. These projects will be identified by communities and prioritised by Council (Ward Councillors particularly) and ward committees.</p>
<b>INTEGRATION</b>		
<p align="center"><b>Intergovernmental Alignment and Public Private Partnership Contribution</b></p>	<p>⇒ Integration of operational strategies (e.g. 5-year Financial Plan; 5-year Capital Investment Programme; Integrated Spatial Development Framework; Integrated Sectoral Programmes/Plans such as LED, HIV, poverty alleviation, gender equity etc.; Consolidated monitoring/performance management system; Disaster Management Plan; Institutional Plan;</p> <p>⇒ Reference to other applicable sector plans that underpin the municipality’s objectives and strategies, align with the resource framework, and comply with the legal requirements</p>	<p>⇒ Align municipal strategy with National, Provincial and District Municipality development policies and planning instruments. <b>(Horizontal and Vertical Alignment)</b></p> <p>⇒ Participate in Provincial IDP INDABA and Joint Planning Forums (e.g. DCF; JDMA; etc.)</p> <p>⇒ Consider, support and incorporate Service Delivery and Development Interventions of other government and private sector counterparts in IDP</p>
<b>APPROVAL</b>		
<p align="center"><b>Tabling and Adoption of Draft IDP and Budget</b></p>		<p>⇒ Finalise, table and adopt the draft IDP</p> <p>⇒ Finalise, table and adopt draft annual budget</p>
<p align="center"><b>Public and Stakeholder Consultation</b></p>	<p>⇒ A Council approved IDP, taking consideration of citizen &amp; stakeholder input, comments and representations</p>	<p>⇒ Make public the draft IDP and draft annual budget for public input, comments and representations.</p> <p>⇒ Submit the draft IDP &amp; annual budget to National and Provincial Treasury, prescribed national and/or provincial organs of state.</p> <p>⇒ Consult the Cape Winelands District Municipality on the draft IDP</p>
<p align="center"><b>Tabling and Approval of IDP and Budget</b></p>		<p>⇒ Council approves the final IDP and final annual budget</p>

## 2.4 Legal Framework: IDP Process Plan

The adoption of the IDP Process Plan is regulated in terms of Section 28 (1) of the MSA which stipulates that:

- 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 IDP;*
- 2) *The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4 of the MSA, consult the community before the adopting the process; and*
- 3) *A municipality must give notice to the local community of particulars of the process it intends to follow.”*

Furthermore, Section 29 (1) of the MSA stipulates that the process followed by a municipality to draft its IDP, including its consideration and adoption of the draft plan, must (amongst others)-

- (a) *“be in accordance with a predetermined programme specifying timeframes for the different steps;*
- (b) *through appropriate mechanisms, processes and procedures 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 IDP;*
  - (iii) *organs of state and other role-players to be identified and consulted on the drafting of the IDP;”*

The Process Plan should not be confused with the Time Schedule (as depicted in section 8). The table below sets out the difference between and a summary of the requirements for an IDP Process Plan vs a 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 the case of a District Municipality.	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.

## 2.5 Annual Revision vs Amendment of the IDP

Section 34 of the MSA prescribes that a municipal council:

- (a) *“must review its IDP-*
  - (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; and*
- b. *may amend its IDP in accordance with a prescribed process.”*

The IDP should 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.

For the IDP to remain relevant the municipality must assess the level of performance achieved, in relation to the predetermined strategic objectives and corresponding performance targets. In the light of this assessment, the IDP is reviewed to reflect the impact of successes as well as corrective measures to address challenges. 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 annual review must inform the municipality’s financial and institutional planning and, most importantly, the drafting of the annual budget. It must be completed in time to properly inform the latter.

It is important to note that the review **is not** a replacement or amendment of the 5-year IDP. The review is not meant to interfere with the 5-year strategic intent of the municipality and development horizon set in the primary document. Therefore, it is of absolute necessity to accurately plan and identify all developmental and service delivery needs and prospects to be pursued over the 5-year implementation cycle. Throughout the 5-year cycle, all versions of the IDP review should be read in conjunction with the approved 5-year IDP document.

Contrastingly, an amendment of the IDP, as permitted in terms of section 34 (b) of the MSA, may be required in instances where the municipality's strategic intent is **substantively and materially** impacted by external and internal factors/circumstances. Examples of such factors/circumstances include the following (amongst others):

- ⇒ changes in legislation, policy, norms or standards;
- ⇒ disasters (e.g. drought, pandemics, etc.);
- ⇒ thresholds being reached in terms of certain municipal parameters (e.g. basic service supply levels);
- ⇒ significant proposals for development in the municipal area that will result in significantly changed human settlement needs, socio-economic needs or altered natural environments;
- ⇒ change in political leadership and subsequently a potential change in priority and strategy

The identification and assessment of such factors will continuously be prioritised, in order to ensure that Management and ultimately Council, is duly informed of the intention to review vs amendment its IDP. In addition, a decision to amend the IDP, will be duly consulted with all applicable stakeholders. It should be noted that the process pertaining to the amendment of a municipal IDP, is clearly prescribed in sub-regulation 3 of the MP&PMR and will apply accordingly.

### **3. Annual Budget**

The budget and the IDP are inextricably linked to one another. Therefore, it is important that the budget and IDP processes be coordinated in a manner that will ensure that the IDP and budget related policies and the final budget are mutually consistent and credible. Credibility refers to the municipality's ability and capacity to spend and deliver services in accordance with its approved budget. The budget processes have been formalised through the promulgation of the Municipal Finance Management Act (56 of 2003), hereafter referred to as the MFMA, coupled with the Municipal Budget & Reporting Regulations (2009). Chapter 4 of the MFMA regulates municipal budgeting, and specifically prescribes the budget compilation process in section 21 (1) of the MFMA as follows:

*“The Mayor of a municipality must-*

- (a) *co-ordinate the processes for preparing the annual budget and for reviewing the municipality's IDP and budget-related policies to ensure that the tabled budget and any revisions of the IDP and budget-related policies are mutually consistent and credible;*
- (b) *at least 10 months before the start of the budget year, table to 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 IDP in terms of section 34 of the MSA; and*
    - (bb) *the budget related policies;*
  - (iii) *the tabling and adoption of any amendments to the IDP and the budget related policies; and*
  - (iv) *any consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).”*

### **4. Service Delivery & Budget Implementation Plan (SDBIP)**

The Service Delivery and Budget Implementation Plan (SDBIP) is an implementation plan of the approved IDP and Medium-Term Revenue and Expenditure Framework (MTREF). Therefore, only projects that are budgeted for are implemented. The SDBIP serves to address the development objectives as derived from the approved IDP. The SDBIP ensures that the municipality implements programmes and projects based on IDP targets and associated budgets.

Section 1 of the MFMA defines the SDBIP as *“a detailed plan approved by the mayor of a municipality in terms of Section 53 (1) (c) (ii) for implementing the municipality's delivery of municipal services and its annual budget, and which must include (as part of the top-layer) the following:*

- (a) *projections for each month of-*
  - (i) *revenue to be collected, by source; and*

- (ii) operational and capital expenditure, by vote;
- (b) service delivery targets and performance indicators for each quarter; and
- (c) any other matters that may be prescribed, and includes any revisions of such plan by the mayor in terms of section 54 (1) (c)''

## **5. Sector Planning**

Local government powers and functions are outlined in the Constitution of South Africa (1996) and in the Municipal Structures Act (117 of 1998). They vary from sector to sector, and according to provincial discretion linked to the delegation of functions to municipalities in respect of certain sectors. The principle underlying the role of sector planning applicable in the IDP process, can be summarised as follows:

- ⇒ Sector planning requirements contained in national sectoral legislation in pertaining to municipal functions, such as water and environmental management, should be dealt with as part of the IDP process (where applicable to the local priority issues). Additional aspects of sector planning requirements, not fully covered in the IDP process, would then require a parallel planning process to the IDP.
- ⇒ Specific sectors which fall beyond the ambit of local competencies, such as education, may however still feature strongly as a priority issue identified in a specific municipal area. As the municipality is not the implementation agent in this regard, attention will still need to be given to the planning process from analysis to integration, to facilitate alignment and co-ordination with other spheres of government and institutions. On this premise, municipalities should utilise integrated planning processes to solicit & leverage national and provincial sectoral contributions (funds and support) to underpin sectors operating locally where there are no legally prescribed planning requirements bestowed on municipalities. In doing so, compliance with national and provincial policy principles and sectoral guidelines will be encouraged.

In the context of BVM, the following sector plans are in process of being drafted, reviewed or will be considered for future development within the 5-year cycle. Ultimately, all developed sectoral plans will be incorporated into the 5<sup>th</sup> Generation IDP – as a high-level overview. The processes and timeframes linked to the compilation and review of sector plans (particularly those plans listed as core components of the IDP) will be encapsulated in the corresponding time schedule (as example, refer to section 8 below) of the financial period in which the processes and timeframes will apply.

⇒ Spatial Development Framework	⇒ Long Term Financial Management Plan
⇒ Water Services Development Plan	⇒ Revenue Enhancement Plan
⇒ Integrated Waste Management Plan	⇒ Integrated Human Settlement Plan
⇒ Air Quality Management Plan	⇒ Integrated Informal Settlement Upgrading Plan
⇒ Local Economic Development & Tourism Strategy	⇒ Disaster Management Plan
⇒ Workplace Skills Plan	⇒ Integrated Transport Management Plan
⇒ Electricity Master Plan	⇒ Roads & Storm Water Master Plan
⇒ Small Scale Embedded Generation Policy	⇒ Pavement Management System
⇒ Community Development Plan	⇒ Safety Plan
⇒ Sport Infrastructure Master Plan	

## **6. Public Participation & Stakeholder Engagement**

Community participation and stakeholder involvement in the IDP and Budget Planning Processes have been formalised and is coordinated in a structured manner. The Municipality recognises and acknowledges existing organised community structures that work towards the improvement and development of communities and will engage with such structures in the process of drafting its IDP and budget. The Municipality will also directly consult and engage with citizens, through the following mechanisms (amongst others):

- ⇒ Public Meetings / IDP and Budget Roadshows
- ⇒ Municipal Imbizo's / Jamboree's

- ⇒ Ward Councillor Report-back Meetings

Other forms of consultations and engagement will be facilitated via the following mechanisms:

- ⇒ Social Media Communication (Facebook, BVM Citizen Engagement Application, Whatsapp)
- ⇒ Radio Interviews, Talk Shows and Announcements
- ⇒ Municipal Press Releases
- ⇒ Municipal Website, Newspaper Articles, Newsletters, Pamphlets and Posters
- ⇒ Community Surveys
- ⇒ Submission of Public Representations, Inputs and Requests

## **7. Roles & Responsibilities**

One prerequisite of a well organised IDP process, is the active involvement of all stakeholders in the process and a sound understanding of their roles and responsibilities. The table below provides an overview of the core role-players involved in the IDP planning and implementation processes.

Note: the roles & responsibilities depicted in the tables below, serves as a general guideline, hence these are not exclusive. The roles & responsibilities may vary based on unique conditions within each municipal environment.

<b>ROLE PLAYERS</b>	<b>ROLES &amp; RESPONSIBILITIES: WITHIN THE MUNICIPALITY</b>
<b>Municipal Manager and/or Delegated Official</b>	<ul style="list-style-type: none"> <li>⇒ The Municipal Manager or a senior official being charged with the function of an IDP Manager on his/her behalf has to manage and co-ordinate the IDP process. This includes to:                             <ul style="list-style-type: none"> <li>- Prepare the Process Plan;</li> <li>- Undertake the overall management and co-ordination of the planning process;</li> <li>- Ensure that all relevant actors are appropriately involved,</li> <li>- Nominate persons in charge of different roles;</li> <li>- Be responsible for the day- to-day management of the drafting process;</li> <li>- Ensure that the planning process is participatory, strategic and implementation orientated and is aligned with and satisfies sector planning requirements;</li> <li>- Respond to comments on the draft IDP from the public, horizontal alignment and other spheres of government to the satisfaction of the municipal council;</li> <li>- Ensure proper documentation of the results of the planning of the IDP document; and</li> <li>- Adjust the IDP in accordance with the MEC for Local Government’s proposals (if required)</li> </ul> </li> <li>⇒ Even if the Municipal Manager delegates some of these functions to an IDP Manager on his/her behalf, he/she is still responsible and accountable.</li> </ul>
<b>Executive Management, Heads of Departments &amp; Officials</b>	<ul style="list-style-type: none"> <li>⇒ As the persons in charge for implementing IDPs, the technical/sectional officials/experts have to be fully involved in the planning process to:                             <ul style="list-style-type: none"> <li>- Provide relevant technical, sector and financial information for analysis for determining priority issues;</li> <li>- Contribute technical expertise in the consideration and finalisation of strategies and identification of projects;</li> <li>- Provide departmental operational and capital budgetary information;</li> <li>- Be responsible for the preparation of project proposals, the integration of projects and sector programmes;</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>- Be responsible for preparing amendments to the draft IDP for submission to the municipal council for approval and the MEC for Local Government for alignment</li> </ul>
<b>Executive Mayor &amp; Mayco</b>	<p>⇒ As the senior governing body of the municipality, they have to:</p> <ul style="list-style-type: none"> <li>- Decide on the Process Plan;</li> <li>- Be responsible for the overall management, co-ordination and monitoring of the process and drafting of the IDP, or delegate this function to the Municipal Manager;</li> <li>- Approve nominated persons to be in charge of the different roles, activities and responsibilities of the process and drafting</li> </ul>
<b>Ward Councillors</b>	<p>⇒ Councillors are the major link between the municipal government and the residents. As such, their role is to:</p> <ul style="list-style-type: none"> <li>- Link the planning process to their constituencies and/or wards;</li> <li>- Be responsible for organising public consultation and participation;</li> <li>- Ensure the annual business plans, and municipal budget are linked to and based on the IDP</li> </ul>
<b>Council</b>	<p>⇒ As the ultimate political decision-making body of the municipality, the Municipal Council has to:</p> <ul style="list-style-type: none"> <li>- Consider and adopt a Process Plan;</li> <li>- Consider, adopt and approve the IDP</li> </ul>

<b>ROLE PLAYERS</b>	<b>ROLES &amp; RESPONSIBILITIES: MUNICIPALITY &amp; EXTERNAL ROLE PLAYERS</b>
<b>Local Municipality</b>	<p>⇒ Prepare, decide on and adopt a Process Plan</p> <p>⇒ Undertake the overall management and co-ordination of the planning process which includes ensuring that:</p> <ul style="list-style-type: none"> <li>- all relevant actors are appropriately involved;</li> <li>- appropriate mechanisms and procedures for public consultation and participation are applied;</li> <li>- the planning events are undertaken in accordance with the time schedule;</li> <li>- planning process is related to the real burning issues in the municipality, that it is a strategic and implementation – oriented process;</li> <li>- the sector planning requirements are satisfied.</li> </ul> <p>⇒ Adopt and approve the IDP</p> <p>⇒ Adjust the IDP in accordance with the MEC for Local Government’s proposal</p> <p>⇒ Ensure that the annual business plans, budget and land use management decisions are linked to and based on the IDP</p>
<b>Communities &amp; Stakeholders</b>	<p>⇒ To represent interests and contribute knowledge and ideas in the planning process by:</p> <ul style="list-style-type: none"> <li>⇒ participating in the related forums (e.g. IDP Rep Forum / Ward Committees, etc.) to: <ul style="list-style-type: none"> <li>- inform interest groups, communities and organisations, on relevant planning activities and their outcomes;</li> <li>- analyse issues, determine priorities, negotiate and reach consensus;</li> <li>- participate in the designing of project proposals and/or asses them;</li> <li>- discuss and comment on the draft IDP;</li> <li>- ensure that annual business plans and budgets are based on and linked to the IDP; and</li> <li>- monitor performance in implementation of the IDP</li> </ul> </li> <li>⇒ conducting meetings or workshops with groups, communities or organisations to prepare for and follow-up on relevant planning activities</li> </ul>
<b>District Municipality</b>	Co-ordination roles for local municipalities:

	<ul style="list-style-type: none"> <li>⇒ Ensuring horizontal alignment of the IDPs of the municipalities in the district council area;</li> <li>⇒ Ensuring vertical alignment between district and local planning;</li> <li>⇒ Facilitation of vertical alignment of IDPs with other spheres of government and sector departments;</li> <li>⇒ Preparation of joint strategy workshops with local municipalities, provincial and national role players and other subject matter specialists</li> </ul>
<p align="center"><b>Provincial Government (Local Government Department &amp; Sector Departments)</b></p>	<ul style="list-style-type: none"> <li>⇒ Ensuring horizontal alignment of the IDPs of the district municipalities within the province</li> <li>⇒ Ensuring vertical/sector alignment between provincial sector departments/provincial strategic plans and the IDP process at local/district level by: <ul style="list-style-type: none"> <li>-guiding the provincial sector departments’ participation in and their required contribution to the municipal planning process; and</li> <li>-guiding them in assessing draft IDPs and aligning their sectoral programmes and budgets with the IDPs</li> </ul> </li> <li>⇒ Efficient financial management of provincial IDP grants</li> <li>⇒ Monitoring the progress of the IDP processes</li> <li>⇒ Facilitation of resolution of disputes related to IDP</li> <li>⇒ Assist municipalities in the IDP drafting process where required</li> <li>⇒ Organise IDP – related training where required</li> <li>⇒ Co-ordinate and manage the MEC’s assessment of IDPs</li> <li>⇒ Contribute relevant information on the provincial sector departments’ plans, programmes, budgets, objectives, strategies and projects in a concise and accessible manner</li> <li>⇒ Contribute sector expertise and technical knowledge to the formulation of municipal strategies and projects</li> <li>⇒ Engage in a process of alignment with district municipalities</li> <li>⇒ Participate in the provincial management system of coordination</li> </ul>

## 8. IDP & Budget Time Schedule – Compilation of the 5<sup>th</sup> Generation IDP (2022 – 2027) & Medium-Term Revenue & Expenditure Framework

The compilation of a time schedule is legislated in terms of section 21 (1) of the MFMA (reference made under sub-section 2.4 and section 3 above). Whilst the process plan depicts the overarching process to be followed over the 5-year cycle, the time schedule depicts the particular processes and activities to be followed in preparation for the yearly review of the IDP, compilation of the budget and implementation of the performance management & monitoring cycle.

On this premise, the time schedule reflected below, depicts key activities relating to:

- ⇒ **future IDP & budget planning, compilation and review/amendment** (i.e. 5<sup>th</sup> Generation IDP – 2022-2027 and Budget/MTREF 2022/23 – 2024/25);
- ⇒ **current IDP & budget project implementation and performance monitoring** (i.e. 4<sup>th</sup> Review of the 4<sup>th</sup> Generation IDP 2021-2022 and Budget/MTREF 2021/22 – 2023/24); and
- ⇒ **past IDP & budget performance reporting** (i.e. 3<sup>rd</sup> Review of the 4<sup>th</sup> Generation IDP 2020-2021 and Budget/MTREF 2020/21 – 2022/23).

Due to the uncertainty linked to the local government election-date at the time, coupled with the subsequent impact on certain activities, the depicted time schedule represents a revised version of the initial time schedule tabled before- and endorsed by the outgoing Council on 24 August 2021 (as per Council Resolution C80/2021 and in compliance with section 21 of the MFMA).

MONTH	ACTIVITIES	DUE DATE	LEGISLATION	RESPONSIBLE PERSON/STRUCTURE
<b>SEPTEMBER 2021</b>	Continue with the compilation of new- or the review of existing Sector Plans for consideration and incorporation in the 5 <sup>th</sup> Generation IDP document			Executive Management/BVM Management/IDP & PMS Unit
	Commence with the compilation/review of ward-based plans to identify ward priorities – earmarked for discussion with the newly elected ward committees & submission to the newly elected Council			Community Development Unit/ IDP & PMS Unit
	Review and prepare the Vision, Mission and Objectives linked to the 5 <sup>th</sup> Generation IDP (for submission to- and consideration by the newly elected Council)			Executive Management/IDP & PMS Unit
	Review of provincial and national government sector and strategic plans		MFMA S35, 36, MTBPS	IDP & PMS Unit
	Consider provincial and national sector specific programmes (schools, libraries, clinics, water, electricity,		MFMA S35, 36, MTBPS	IDP & PMS Unit

	roads, etc.) for preliminary alignment/inclusion in 5 <sup>th</sup> Generation IDP			
	Audit of performance measures			AG
	Assess municipal performance and identify where changes are needed for next 3 years [incorporate community inputs]			Executive Management/IDP & PMS Unit
	Review the municipality's performance management system (PMS)		MPPR Reg. 14	Internal Audit/IDP & PMS Unit
	Review the measures and annual performance targets (as and when recommended by the AG)			IDP & PMS Unit
	Send reminder to BVM Management to submit their performance inputs for consideration in the 2021/2022 Q1 SDBIP Performance Report			IDP & PMS Unit
<b>October 2021</b>	Integration of information from reviewed provincial and national sector plans into the IDP Review document			IDP & PMS Unit
	Update and review the strategic elements of the IDP			IDP & PMS Unit
	IDP Steering Committee Meeting			IDP & PMS Unit
	Discuss potential price increases of bulk resources with sector departments		MFMA S35, 36, 42; MTBPS	Accounting Officer/CFO
	Determine revenue projections and proposed rates and service charges	Oct 2021		CFO/Budget Steering Committee/Budget & Costing Unit
	Drafts initial allocations to functions and departments for the next financial year based on strategic objectives	Oct 2021		CFO/Budget & Costing Unit
	Engagement with sector departments, share and evaluate plans, national policies, MTBPS			CFO/Financial Planning Unit
	Incorporate initial changes into IDP			IDP & PMS Unit
	Submission of 2021/22 Q1 performance inputs by BVM Management			Executive Management/BVM Management/IDP & PMS Unit
	Tabling & submission of the unaudited Q1 SDBIP Performance Report (for first quarter of 2021/22) to Council & stakeholders		MSA S41 (1)(e); MFMA S52 (d); MPPR Reg. 14	Director Strategic Support Services/IDP & PMS Unit
	S57 Managers' <b>informal</b> quarterly performance assessments (for first quarter of 2021/22)			Executive Management/BVM Management/IDP & PMS Unit

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<b>November 2021</b>	Local Government Elections – 1 November 2021			
	Review of Municipal Strategies, Objectives, KPA's, KPI's and targets			Executive Management/IDP & PMS Unit
	Identification of priority IDP projects based on stakeholder inputs			Executive Management/IDP & PMS Unit
	Reviews and initial changes are drafted into IDP		MSA S34	IDP & PMS Unit
	Accounting officer and senior officials consolidate and prepare proposed budget and plans for next financial year taking into account previous year's performance as per audited financial statements	Nov 2021		Executive Management/Budget Steering Committee
	Identify new CAPEX/OPEX projects and programmes emanating from IDP & Budget engagements	Nov 2021		Executive Management/IDP Steering Committee/Budget & Costing Unit/IDP & PMS Unit
	Auditor-General provides audit report by 30 November 2021		MFMA S126(4)	AG/Accounting Officer
	Review performance of service providers as per the approved policy			Executive Management/BVM Management
	S57 Managers' <b>formal</b> quarterly performance assessments (for fourth quarter and as at year-end of 2020/21)			Executive Mayor/Portfolio Councillors/Executive Management/IDP & PMS Unit
	Commence with the establishment of Ward Committees (detailed process to be reflected in the ensuing process plan)			Director Community Services/Community Development Unit
Commence with 1st round public participation sessions (full public engagements) throughout all wards			Executive Management/BVM Management/IDP & PMS Unit	
Commence with the compilation of the 5 <sup>th</sup> Generation IDP Process Plan		MSA S28	Executive Management/BVM Management/IDP & PMS Unit	
<b>DECEMBER 2021</b>	Continuation of 1st round public participation sessions (full public engagements) throughout all wards			Executive Management/BVM Management/IDP & PMS Unit
	Mayor tables the draft 2020/21 Annual Report in Council (last week of November or first week of December)		MFMA S127(2)	Executive Mayor/Accounting Officer/IDP & PMS Unit
	The draft 2020/21 Annual Report is referred to MPAC for commencement of the oversight process		MFMA S129	Enterprise Risk Management Unit/IDP & PMS Unit
	Submit the draft 2020/21 Annual Report to National Government, Provincial Government & the AG) and publish		MFMA S127 & MSA S21a	IDP & PMS Unit

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	it on local media platforms, calling for community inputs/representations thereon			
	Table the final 2020/21 Annual Report & Oversight Report in Council, for Council's consideration & adoption/approval		MFMA S121, S127 & S129	IDP & PMS Unit
	Council considers the 2020/21 Oversight Report and adopts/approves the 2020/21 Annual Report			Council/IDP & PMS Unit
	Publicise the final 2020/21 Annual & Oversight Report and submit it to the National (NT) and Provincial (PT & DLG) Government as well as the AG		MFMA S127, 129 & 132; MSA S21A	IDP & PMS Unit
	Departments to comment on the reviewed Municipal Strategies, Objectives, KPA's, KPI's and targets			Executive Management/BVM Management
	Project alignment between CWDM and BVM			IDP & PMS Unit
	Review & refinement of priority IDP projects			IDP & PMS Unit
	Council finalises tariff policies for next financial year		MSA S74, 75	Executive Mayor/CFO
	Inputs from Departments for Adjustments Budget	Dec 2021		Executive Management/Budget Steering Committee/Budget & Costing Unit
	Commence with preparations pertaining to the 2021/22 mid-year performance review and S57 Managers' performance assessment			IDP & PMS Unit
	Review and respond to recommendations contained in LG-MTEC reports and IDP (2021/22) Analysis Reports	Dec 2021		IDP & PMS Unit
	Send reminder to BVM Management to submit their performance inputs for consideration in the 2021/22 Q2 SDBIP Performance Report		MSA S41 (1)(e); MFMA S52 (d)	IDP & PMS Unit
<b>JANUARY 2022</b>	Review of Municipal Strategies, Objectives, KPA's, KPI's and targets in strategic planning session with senior management			IDP & PMS Unit
	Review & refinement of priority IDP projects			IDP & PMS Unit
	IDP Steering Committee Meeting			IDP & PMS Unit
	Submission of 2021/22 Q2 performance inputs by BVM Management			Executive Management/BVM Management/IDP & PMS Unit

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	Tabling & submission of the unaudited Q2 SDBIP & Financial Performance Report – Section 72 (for second quarter of 2021/22) to Council & stakeholders		MSA S41 (1)(e); MFMA S52 (d); MPPR Reg. 14	Accounting Officer/CFO/Director Strategic Support Services/Financial Planning Unit/IDP & PMS Unit
	Publicise the draft 5th Generation IDP Process Plan for public consideration and input		MSA S28(2)	Executive Management/BVM Management/IDP & PMS Unit
	Submit the 5th Generation IDP Process Plan (with comments/inputs – if any) to the newly elected Council for consideration and adoption of the proposed process as prescribed in section 28		MSA S25  MSA S28	Council/Executive Management/IDP & PMS Unit
	Publication of the approved 5 <sup>th</sup> Generation IDP Process Plan on the municipal website for public notification and submission to NT, PT, DLG and the CWD		MSA S28(3)	IDP & PMS Unit
	Strategic workshop – Council, Executive Management & Management Team to engage on (amongst others) the strategic nature & principles linked to the draft IDP and Budget; the planning process and the IDP adoption methodology			Council/Executive Management/BVM Management
<b>FEBRUARY 2022</b>	Ward Committee establishment (within 90 days after the inauguration of the new Council)			Director Services/Community Development Unit
	Continuous Review of Municipal Strategies, Objectives, KPA's, KPI's and targets			IDP & PMS Unit
	Continuous identification/review of priority IDP projects			Executive Management / BVM Management / IDP & PMS Unit
	Assess the municipality's service delivery performance and the service delivery targets and performance indicators set in the 2021/22 TL SDBIP, amend if necessary, and submit to Council for consideration and approval			Executive Management/BVM Management/ IDP & PMS Unit
	Subject to Council's approval, submit the amended 2021/22 TL SDBIP to NT, PT and DLG			IDP & PMS Unit
	Assess the past year's annual report, and progress on resolving issues identified in the annual report			Executive Management/BVM Management/ IDP & PMS Unit
	Accounting Officer finalises and submits to Mayor proposed budgets and plans for next three-years, taking into			Accounting Officer/CFO/Budget & Costing Unit

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	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			
	Prepare Adjustments Budget	Feb 2022		CFO/Budget & Costing Unit
	Table Adjustments Budget before Council	Feb 2022	MFMA S28(2) b,d,f	Executive Mayor
	S57 Managers' <b>formal</b> quarterly performance assessments (for second quarter and as at mid-year of 2021-2022)			Executive Mayor/Portfolio Councillors/Executive Management/IDP & PMS Unit
	Accounting officer reviews proposed national and provincial allocations to municipality for incorporation into the draft budget for tabling	Feb 2022	MFMA S36	CFO/Manager Budget & Costing
<b>MARCH 2022</b>	Submit approved Adjustments Budget to NT, PT and Public	10 Working days after approval		Budget & Costing Unit
	Commence with the compilation of the 2022/23 SDBIP (coupled with consideration of 5-year performance scorecard) & S57 Performance Agreements			Executive Management/BVM Management/IDP & PMS Unit
	Conclusion of the draft Municipal Strategies/Sector Plans, Objectives, KPA's, and KPI's and targets for inclusion in the draft IDP & Budget			IDP & PMS Unit
	IDP Steering Committee Meeting			IDP & PMS Unit
	Mayor tables the draft 5 <sup>th</sup> Generation IDP & 2022/23 Budget, at least 90 days before start of budget year, to Council for consideration	March 2022	MFMA S16, 22, 23, 87; MSA S 34	Executive Mayor/Executive Management/
	Submit 1 <sup>st</sup> draft 2022/23 SDBIP to Council			IDP & PMS Unit
	Send reminder to BVM Management to submit their performance inputs for consideration in the 2021/22 Q3 SDBIP Performance Report		MSA S41 (1)(e); MFMA S52 (d)	IDP & PMS Unit
	Set performance objectives for revenue for each budget vote		MFMA S 17	CFO/Revenue Unit
	Commence with 2nd round public participation sessions (engagements with ward committees/public) throughout all wards on the draft 5 <sup>th</sup> Generation IDP and Budget			Council/Executive Management/BVM Management/IDP & PMS Unit
<b>APRIL 2022</b>	Publicise draft 5 <sup>th</sup> Generation IDP and 2022/23 Budget and invite local community to make written comments in respect of the IDP and Budget	Immediately after Tabling before Council	MFMA S22 & MSA S21A	Accounting Officer/CFO/Director Strategic Support Services/Budget & Costing Unit/IDP & PMS Unit

**DRAFT BREEDE VALLEY MUNICIPALITY IDP/BUDGET/PMS PROCESS PLAN 2022 - 2027**

Accounting officer publishes tabled budget, plans, and proposed revisions to IDP and submits to NT, PT and others as prescribed	Immediately after Tabling Council	MFMA S22 & MSA S21A	Accounting Officer/CFO/Director Strategic Support Services/Budget & Costing Unit/IDP & PMS Unit
Review written comments/input received in respect of the Budget and IDP	April 2022	Best Practice	Executive Management/Budget & Costing Unit/IDP & PMS Unit
Finalisation of the Municipal Strategies/Sector Plans, Objectives, KPA's, and KPI's and targets for inclusion in the final IDP & Budget			IDP & PMS Unit
IDP Steering Committee Meeting			IDP & PMS Unit
Continue with the 2nd round public participation sessions (engagements with ward committees/public) throughout all wards on the draft 5th Generation IDP and Budget			Council/Executive Management/BVM Management/IDP & PMS Unit
Review/finalisation of community inputs on the draft IDP & Budget			IDP Steering Committee/Executive Management/BVM Management/IDP & PMS Unit
District/Local Municipalities' Alignment of Strategies			IDP & PMS Unit
Prepare departmental business plans linked to the IDP strategies, objectives, KPI's and targets			IDP & PMS Unit
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	30 April 2022	MFMA S21	MM/CFO
Submission of 2021/22 Q3 performance inputs by BVM Management			Executive Management/BVM Management/IDP & PMS Unit
Tabling & submission of the unaudited Q3 SDBIP Performance Report (for third quarter of 2021/22) to Council & stakeholders		MSA S41 (1)(e); MFMA S52 (d); MPPR Reg. 14	Director Strategic Support Services/IDP & PMS Unit
Refinement & finalisation of Municipal Strategies/Plans, Objectives, KPA's, KPI's and targets and inclusion into 5 <sup>th</sup> Generation IDP Review report			IDP & PMS Unit
S57 Managers' <b>informal</b> quarterly performance assessments (for third quarter of 2021/22)			Executive Management/BVM Management/IDP & PMS Unit

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	Review annual organisational performance targets		MPPR Reg. 11	MM/IDP & PMS Unit
<b>May 2022</b>	Accounting officer assists the Mayor in preparing the final IDP & Budget documentation for Council's consideration & approval at least 30 days before the start of the new fiscal year taking into account consultative processes and any other new information	May 2022	MFMA S23	Executive Management/Executive Mayor/Council
	Convene IDP Representative Forum			IDP & PMS Unit
	EXCO recommends adoption of the IDP to Council			Council/Executive Management/IDP & PMS Unit
	Council to consider approval/adoption of the IDP, Budget and all other associated documentation as legislatively prescribed (e.g. sectoral plans, taxes and tariffs, budget related policies, etc.) at least 30 days before start of budget year	31 May 2022	MFMA S23, 24; MSA Ch 4	Council
	Publish the IDP, Budget and all other associated documentation as legislatively prescribed on the municipal website	Within 5 days of adoption	MFMA S75; MSA S21A	Budget & Costing Unit/IDP & PMS Unit
	Consider community input into the municipality's SDBIP (KPIs and targets)			IDP & PMS Unit
<b>JUNE 2022</b>	Submission of the approved Budget, IDP & other associated documentation (as legislatively prescribed) to National (NT) & Provincial Government (PT, DLG & DEADP)	Within 10 working days after Council approval	MBRR 20	Accounting Officer/CFO/Director SSS/Budget & Costing Unit/IDP & PMS Unit
	Give notice to the public of the adoption of the IDP, Budget and other associated documentation as legislatively prescribed	Within 10 working days after Council approval	MSA S21A; MSA S25 (4)(a); MBRR 18	Accounting Officer/CFO/Director SSS/Budget & Costing Unit/IDP & PMS Unit
	Submission of 2 <sup>nd</sup> (final) draft SDBIP & S57 Performance Agreements to the Executive Mayor, no later than 14 days after the approval of the Budget		MFMA S69(3)	Executive Mayor/Executive Management/IDP PMS Unit
	Conclusion & submission of the final TL SDBIP to the Executive Mayor for approval within 28 days after approval of the budget; coupled with the finalisation and conclusion of the annual S57 Performance Agreements by no later than 30 days after commencement of the new financial year (note: the S57 Performance Agreements will be concluded & published in July should it not be finalised within June)		MFMA S53;  MSA S 38-45, 57(2)	Executive Mayor/Executive Management/IDP & PMS Unit

**DRAFT BREEDE VALLEY MUNICIPALITY IDP/BUDGET/PMS PROCESS PLAN 2022 - 2027**

	Publication of approved SDBIP & S57 Performance Agreements on the municipal website/social media/local media & circulation thereof to National Government (NT) and Provincial Government (PT & DLG – MEC for Local Government)		MFMA S53(3); MBRR 19	IDP & PMS Unit
	Send reminder to BVM Management to submit their performance inputs for consideration in the 2021/22 Q4 SDBIP Performance Report		MSA S41 (1)(e); MFMA S52 (d)	IDP & PMS Unit
<b>JULY 2022</b>	Preparation of the draft 2023/24 IDP/Budget/Performance Management Time Schedule (hereafter referred to as the Time Schedule) for implementation in the 2022/23 financial period		MFMA S21(1)(b)	Executive Management/BVM Management//IDP & PMS Unit
	Executive/Senior Management to discuss & provide input on the draft Time Schedule & to ensure internal alignment			Executive Management/BVM Management//IDP & PMS Unit
	Engagement with the Provincial Department of Local Government & Cape Winelands District Municipality to ensure alignment, coupled with the submission of the draft Time Schedule to them for input			PGWC/CWDM/IDP & PMS Unit
	Address provincial IDP Assessment findings (subject to the receipt of correspondence from the Provincial DLG)		MSA S31	DLG/Executive Management/BVM Management/IDP & PMS Unit
	Executive Mayor initiates planning for next three-year budget cycle in accordance with co-ordination role of budget process and review of previous year's budgeting process		MFMA S53	Executive Mayor/Executive Management
	Accounting Officer, Executive Management and Senior Management of municipality review options and contracts for service delivery		MSA S76-81	Executive Management/BVM Management
	Approve and announce new budget schedule and set up committees and forums after consultation on performance and changing needs			Executive Management
	Submission of 2021/22 Q4 performance inputs by BVM Management			Executive Management/BVM Management/IDP & PMS Unit
	Tabling & submission of the unaudited Q4 SDBIP Performance Report (for last quarter of 2021/22) to Council & stakeholders		MSA S41 (1)(e); MFMA S52 (d); MPPR Reg. 14	Director Strategic Support Services/IDP & PMS Unit

**DRAFT BREEDE VALLEY MUNICIPALITY IDP/BUDGET/PMS PROCESS PLAN 2022 - 2027**

	Finalisation of S57 Performance Agreements & submission to the Executive Mayor & Municipal Manager for approval by no later than 31 July 2022 (subject to not being concluded during June)		MFMA S69 MSA S57	Executive Mayor/Executive Management/IDP & PMS Unit
	Tabling the approved SDBIP & S57 Performance Agreements in Council for notification purposes			Council/Executive Management/IDP & PMS Unit
	Commence with the preparation/review of Sector Plans for consideration/incorporation in the 2023/24 IDP & Budget			Executive Management/BVM Management
	Preparation of the 2021/22 draft Annual Financial Statements & collation of user input into the 2021/22 draft Annual Report & Annual Performance Report		MFMA S126(1)(a); MSA S46	Executive Management/BVM Management/IDP & PMS Unit
<b>AUGUST 2022</b>	Roll-Over Budget tabled to Council	Aug 2022	MFMA S28(2)(e), MBRR 23(5)	CFO/Budget & Costing Unit
	Executive Mayor tables the Time Schedule in Council	Aug 2022	MFMA S21,22,23 MSA S34	Council/IDP & PMS Unit
	Submit approved Time Schedule to National Treasury, Provincial Treasury, Department of Local Government and the Cape Winelands District Municipality	Aug 2022		IDP & PMS Unit
	Publication of the approved Time Schedule in order to meet AG audit requirements			IDP & PMS Unit
	Review comments received from DLG (where applicable) on the 2022/23 IDP document (5 <sup>th</sup> Generation IDP 2022 - 2027)			IDP Steering Committee/Executive Management/IDP/PMS unit
	Self-assessment to identify gaps in the IDP process			IDP Steering Committee / Executive Management / BVM Management / IDP/PMS unit
	Review situational analysis to identify changing community needs and challenges			IDP Steering Committee / IDP/PMS unit
	Review of Municipal Strategies, Objectives, KPA's, KPI's and targets			IDP Steering Committee / Executive Management / BVM Management / IDP/PMS unit

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	Accounting Officer submits final draft Annual Financial Statements and Annual Performance Report (pertaining to the 2021/22 financial period respectively) to the Auditor-General by 31 August 2022	Aug 2022	MFMA S126(1)(a); MSA S46	Accounting Officer/CFO/Director Strategic Support Services
<b>INTERGOVERNMENTAL ALIGNMENT</b>				
<b>District/Provincial Alignment</b>	<b>Municipal First Quarter (2021/22)</b>	<b>2021/09/01</b>	<b>2021/09/30</b>	
	District IDP Managers Forum	September 2021 (TBC)		Manager: IDP
	DCF	September 2021(TBC)		Mayors/MMs/HODs/Senior Officials & District Support Teams
	Provincial IDP Managers Forum	September 2021		DLG: IDP Directorate
	<b>Municipal Second Quarter</b>	<b>2021/10/01</b>	<b>2021/12/31</b>	
	DCF	TBC		Mayors/MMs/HODs/Senior Officials & District Support Teams
	SIME	November 2021		Provincial Government & Municipalities
	Provincial IDP Managers Forum	TBC		DLG: IDP Directorate
	<b>Municipal Third Quarter</b>	<b>2022/01/01</b>	<b>2022/03/31</b>	
	Mid-year budget and performance assessment visits	2022/01/01	2022/03/31	Provincial Treasury
	DCF	TBC		Mayors/MMs/HODs/Senior Officials & District Support Teams
	TIME	February 2022		PT/DLG/MM's/CFO's
	IDP Indaba	February 2022		Provincial Departments & Municipalities
	Provincial IDP Managers Forum	TBC		DLG: IDP Directorate
	<b>Municipal Fourth Quarter</b>	<b>2022/04/01</b>	<b>2022/06/30</b>	
	IDP, Budget and Benchmark Assessments	2021/04/01		Provincial Departments & Municipalities
		2021/05/31		
DCF	TBC		Mayors/MMs/HODs/Senior Officials & District Support Teams	
Provincial IDP Managers Forum	TBC		DLG: IDP Directorate	

## 9. Proposed IDP & Budget Public Participation Engagements

Public consultation linked to the compilation and subsequent review of the IDP and budget, will comprise of two formal rounds of public participation engagements within a particular financial period. The 1<sup>st</sup> round of engagements will be scheduled during October – November of the applicable financial period, whilst the 2<sup>nd</sup> round will be scheduled in March – April of the same financial period. The public participation schedule, format, objectives and logistical arrangements will be encapsulated in the corresponding financial period’s time schedule, consulted with stakeholders and tabled to Council for approval. The approved time scheduled will be published for public notification. The municipality reserves the right to amend the schedule, or any part thereof, should unforeseen circumstances dictate. In such instances, the proposed amendments and rationale thereof, will be duly communicated with stakeholders.

The tables below, depict the public participation engagements linked to the compilation of the 5<sup>th</sup> Generation IDP and budget.

### ***FIRST ROUND: NOVEMBER – DECEMBER 2021***

<b>DATE</b>	<b>WARD</b>	<b>COUNCILLOR</b>	<b>VENUE</b>	<b>TIME</b>
22-Nov-2021	13	Ald R Farao	VGK Worcester South	18:00
	15	Cllr J Pieters	NGK Worcester West	18:00
23-Nov-2021	5	DM J Von Willingh	De Wet Church	19:00
	16	Cllr M Mangali	Zwelethemba MPC	18:00
24-Nov-2021	4	Cllr F Vaughan	Orchard Primary School	19:00
	9	Cllr G Daames	VGK Worcester East	18:00
25-Nov-2021	6	Cllr E Van Der Westhuizen	NGK Worcester Audenberg	18:00
	7	Cllr J Kritzinger	Worcester Lions Club	18:00
29-Nov-2021	10	Cllr M Swartz	AME Calvary	18:00
	18	Cllr L Yayi	Zwelethemba MPC	18:00
30-Nov-2021	11	Ald M Sampson	BVM Indoor Sport Centre	18:00
	12	Cllr V Bedworth	Hugo Naude Centre / Little Theatre	18:00
01-Dec-2021	8	Cllr M Williams	Zwelethemba Community Hall	18:00
02-Dec-2021	17	Cllr T Sibozo	Zwelethemba Community Hall	18:00
06-Dec-2021	1	Cllr R Johnson	Steenvliet Community Hall	18:00
07-Dec-2021	14	Cllr J Jack	Victoria Park Primary School	18:00
	21	Cllr D Judge	Breërivier High School	18:00

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08-Dec-2021	2	Cllr C Nyithana	De Doorns MPC	19:00
	19	Cllr M Goedeman	VGK Rawsonville	18:30
09-Dec-2021	3	Cllr O Ralehoko	De Doorns MPC	19:00
	20	Cllr A Pietersen	VGK Rawsonville	19:00

**SECOND ROUND: MARCH – APRIL 2022**

<b>DATE</b>	<b>WARD</b>	<b>COUNCILLOR</b>	<b>VENUE</b>	<b>TIME</b>
30-Mar-2022	1	Cllr R Johnson	Steenvliet Community Hall	18:00
31-Mar-2022	3	Cllr O Ralehoko	De Doorns MPC	19:00
	20	Cllr A Pietersen	VGK Rawsonville	19:00
4-Apr-2022	10	Cllr M Swartz	AME Calvary	18:00
	18	Cllr L Yayi	Zwelethemba MPC	18:00
5-Apr-2022	5	DM J Von Willingh	De Wet Church	19:00
	16	Cllr M Mangali	Zwelethemba MPC	18:00
6-Apr-2022	4	Cllr F Vaughan	Orchard Primary School	19:00
	9	Cllr G Daames	VGK Worcester East	18:00
7-Apr-2022	14	Cllr J Jack	Victoria Park Primary School	18:00
	21	Cllr D Judge	Breërivier High School	18:00
11-Apr-2022	8	Cllr M Williams	Zwelethemba Community Hall	18:00
	2	Cllr C Nyithana	De Doorns MPC	19:00
12-Apr-2022	11	Ald M Sampson	BVM Indoor Sport Centre	18:00
	12	Cllr V Bedworth	Hugo Naude Centre / Little Theatre	18:00
13-Apr-2022	6	Cllr E Van Der Westhuizen	NGK Worcester Audenberg	18:00
	7	Cllr J Kritzinger	Worcester Lions Club	18:00
14-Apr-2022	17	Cllr T Sibozo	Zwelethemba Community Hall	18:00
	19	Cllr M Goedeman	VGK Rawsonville	18:30
18-Apr-2022	13	Ald R Farao	VGK Worcester South	18:00
	15	Cllr J Pieters	NGK Worcester West	18:00

