

West Coast District Municipality



IDP Process Plan

(Section 28 of the Municipal Systems Act)

2022 – 2027

July 2022

***Vision: Weskus the caring centre for innovation
& excellence***

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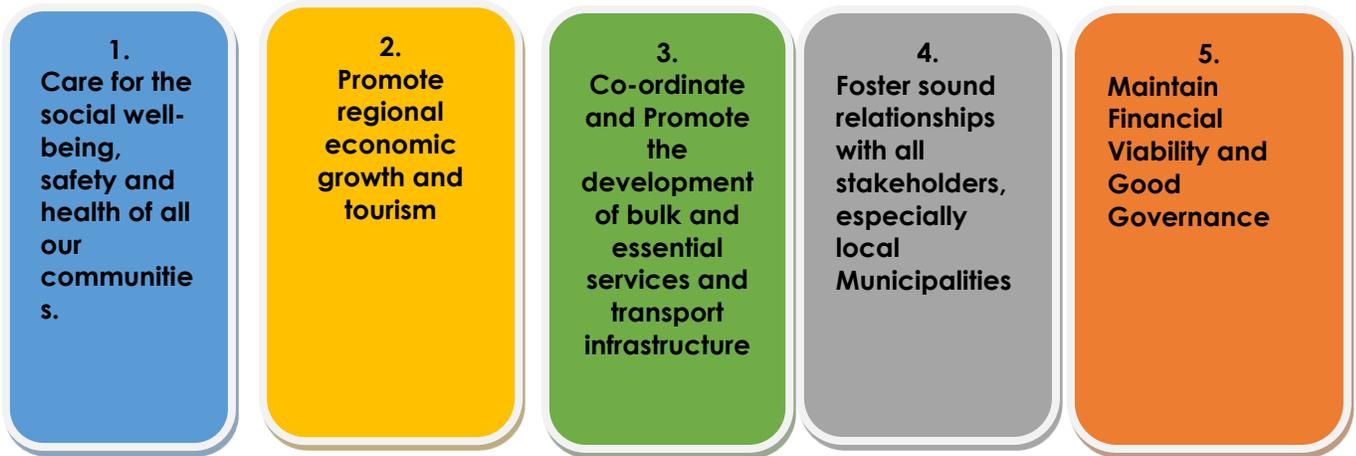
1. Vision, mission and objectives



Vision: Weskus the caring centre for innovation & excellence

Mission: Promote drivers of change, by leading well-co-ordinated and innovative initiatives to achieve sustainable and integrated development of West Cost

Objectives:



What are our core values?

- **Integrity-** accountability and ethics to the citizens
- **Transparency** to be transparent and open in our business
- **Loyalty** putting the organisation first
- **Respect** will treat public and colleagues with fairness, respect and consideration
- **Quality** achieving or exceeding measurable standards
- **Ownership** taking pride in our work
- **Teamwork** working together to achieve our goals

2. Purpose and legislative background of the Process Plan and IDP

Section 28 determines that each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan. It further indicates that the municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4 of the act, consult the local community before adopting the process. Lastly, that a municipality must give notice to the local community of particulars of the process it intends to follow.

Section 29 determines that (1) The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must—

- (a) be in accordance with a predetermined programme specifying timeframes for the different steps;
 - (b) through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for—
 - (i) the local community to be consulted on its development needs and priorities;
 - (ii) the local community to participate in the drafting of the integrated development plan; and
 - (iii) organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the integrated development plan;
 - (c) provide for the identification of all plans and planning requirements binding on the municipality in terms of national and provincial legislation; and
 - (d) be consistent with any other matters that may be prescribed by regulation.
- (2) A district municipality must—
- (a) plan integrated development for the area of the district municipality as a whole but in close consultation with the local municipalities in that area;
 - (b) align its integrated development plan with the framework adopted in terms of section 27; and
 - (c) draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the local municipalities in that area.
- (3) A local municipality must—
- (a) align its integrated development plan with the framework adopted in terms of section 27; and
 - (b) draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the district municipality.

Section 30. indicates the roles and responsibilities in management of drafting process.—The executive committee or executive mayor of a municipality or, if the municipality does not have an executive committee or executive mayor, a committee of councillors appointed by the municipal council, must, in accordance with section 29—

- (a) manage the drafting of the municipality's integrated development plan;
- (b) assign responsibilities in this regard to the municipal manager; and
- (c) submit the draft plan to the municipal council for adoption by the council.

Section 31 indicates Provincial monitoring and support.—The MEC for local government in the province may, subject to any other law regulating provincial supervision of local government—

- (a) monitor the process followed by a municipality in terms of section 29;

(b) assist a municipality with the planning, drafting, adoption and review of its integrated development plan;

(c) facilitate the coordination and alignment of—

(i) integrated development plans of different municipalities, including those of a district municipality and the local municipalities within its area; and

(ii) the integrated development plan of a municipality with the plans, strategies and programmes of national and provincial organs of state;

(d) take any appropriate steps to resolve disputes or differences in connection with the planning, drafting, adoption or review of an integrated development plan between—

(i) a municipality and the local community; and

(ii) different municipalities.

What is Integrated Development Planning?

Integrated development planning is a process through which a municipality can establish a development plan for the short, medium and long-term.

Section 24 of the Municipal Systems Act, under Municipal planning in co-operative government, outlines that: The planning undertaken by a municipality must be aligned with, and complement, the development plans and strategies of other affected municipalities and other organs of state so as to give effect to the principles of co-operative government contained in section 41 of the Constitution.

Under **Adoption of integrated development plans**, Section 25 outlines that: (1) Each municipal council must, within a prescribed period after the start of its elected term, adopt a single, inclusive and strategic plan for the development of the municipality which—

In effect, the **integrated development plan** is a planning and strategic framework to help municipalities fulfil their developmental mandate:

- It enables municipalities to align their financial and institutional resources behind agreed policy objectives and programmes.
- It is a vital tool to ensure the integration of a municipality's activities with other spheres of development planning at provincial, national and international levels, by serving as a basis for communication and interaction.
- It serves as a basis for engagement between the municipality and the citizens of the district, as well as with various stakeholders and interest groups.
- It enables municipalities to weigh up their obligations and systematically prioritise programmes and resource allocations. In a context of great inequalities, integrated development plans serve as a framework for municipalities to prioritise their actions around meeting urgent needs, while maintaining the overall economic, municipal and social infrastructure already in place.

- It assists municipalities to focus on the environmental sustainability of their delivery and development strategies.
- It helps municipalities to develop a holistic strategy for poverty alleviation.

Source: IDP Guidepacks, GTZ

The IDP outlines key areas where the municipality must intervene and focus its resources in order to achieve its goal.

3.Strategic alignment & integration

District Based Approach at National Level

The President's Coordinating Council (PCC) has endorsed a new district-based model for development that will synchronise planning by all spheres of government and involve citizens and civil society in the development of South Africa's 44 municipal districts and eight (8) Metros.

Across the 44 districts and 8 Metros in the country, all developmental initiatives will be viewed through a district-level lens. Development will be pursued through single, integrated plans per district – one district, one plan – that will outline the role of each sphere of government as well as the role of communities and civil society sectors in each district.

The district-driven model is directed at turning plans into action, and ensuring proper project management and tracking.

The Joint District Approach (JDA) at Provincial level

At the advent of the 6th National Parliament a “new way” of working together has been introduced termed the “Joint District Approach” (JDA) or District Coordination Model at provincial and national levels respectively. In the Western Cape, the Joint District Approach represents a geographical (district) and team based, citizen focused approach, with a single implementation plan to provide developmental initiatives and government services.

Central to this approach is the principles of co-planning, co-budgeting, co-implementation and its translation into service delivery to communities. As such is it envisions a District Single Implementation Plan (DSIP)– developmental initiatives, planning and strategic priorities, service delivery and capacity building – to be developed. This document contains the West Coast DSIP.

Through the JDA process an intergovernmental platform was established between the Western Cape Government (WCG) and the municipalities within the Weskus district to facilitate strategic engagement and to create a process for decision making on programme and project prioritisation across sectors and spheres of government both for the short and long term.

The overall purpose of this intergovernmental platform will be to:

- Ascertain the current realities and constraints and/or opportunities;
- Attempt to align existing planning processes and budgets between the three (3) spheres of government, other government agencies (including parastatals) and relevant state-owned entities;
- Outline strategic decisions and trade-offs that need to be made to achieve the vision in a complex and changing environment;
- Identify and guide the planning and execution of major interventions;
- To co-ordinate the determination of priorities and sequencing of programmes and/or projects based on available funding resources and guide resource allocations; and
- Mobilise and direct new investments.

The JDA promotes collaboration using District Coordinating Forums as the governance instruments for co-planning, co-budgeting and co-implementation to strengthen service delivery to communities. As such the West Coast District team identified and consolidate the following eight (8) strategic planning priorities, namely:

- Safety
- Economic Growth
- Education and Social Well being
- Housing
- Water and Waste Management
- Energy Security
- Integrated Transport
- ICT Connectivity

These District Priorities has been linked up to the various National and Provincial priority areas (see table and graphic illustration below). Subsequently key infrastructure related and other relevant strategic programmes and projects has been identified for inclusion in this plan.

Cabinet approved the District Development Model (DDM) as an All of Government and Society Approach providing a method by which all three spheres of government and state entities work in unison in an impact-oriented way, where there is higher performance and accountability for coherent and effective service delivery and development outcomes.

The DDM is an intergovernmental approach focusing on 44 districts and 8 metropolitan spaces for more effective joint planning, budgeting and implementation over multi-year planning and electoral cycles. Although each sphere, sector or entity has its distinct constitutional powers, functions and responsibilities, they cooperate and undertake collaborative planning, budgeting and implementation processes converging developmental efforts at the district/metropolitan level.

The objectives of the DDM are to:

- solve the silos at a horizontal and vertical level;
- maximise impact and align plans and resources at our disposal through the development of “One District, One Plan and One Budget”;
- narrow the distance between people and government by strengthening the coordination role and capacities at the district level;
- ensure inclusivity through gender-responsive budgeting based on the needs and aspirations of our people and communities at a local level;
- build government capacity to support to municipalities;
- strengthen monitoring and evaluation at district and local levels;
- implement a balanced approach towards development between urban and rural areas;
- ensure sustainable development whilst accelerating initiatives to promote poverty eradication, employment and equality; and
- exercise oversight over budgets and projects in an accountable and transparent manner.

The Western Cape Government specific approach to the DDM is called the Joint District and Metro Approach (JDMA). The JDMA envisages for the three spheres of government to converge, using IGR engagements, to develop similar Western Cape strategic, development and planning priorities with aligned budgets an accelerated implementation for service delivery.

The JDMA -

- is a geographical (district) and team based, citizen focused approach;
- has the output of a single implementation plan to provide planning and strategic priorities, developmental initiatives, service delivery and capacity building;
- has the desired outcome of improving the living conditions (lives) of citizens;
- has a horizontal interface (between provincial departments) and a vertical interface (National, Provincial and local government spheres);

- does not exclude local municipalities;
- is not a functions and power debate; and
- promotes collaboration using the District Coordinating Forum as the governance instrument for co-planning, co-budgeting and co-implementation to strengthen service delivery to communities.

Various fora exist at provincial level with the aim of promoting integrated planning, budgeting and implementation. These include the following:

- Technical Integrated Municipal Engagement
- Strategic Integrated Municipal Engagement
- IDP Indaba (when in session)
- Provincial IDP Managers Forum
- Provincial Public Participation Forum

Internal organisational arrangements

The Extended Management Team of the West Coast District Municipality will act as the internal IDP Steering Committee and will have the following brief:-

- Internal co-ordination of the IDP drafting/ review or amendment process
- Inter-departmental communication and information regarding the Integrated Development Plan of the WCDM
- A consultative body that acts as clearing house for those aspects and issues that have to be included in the IDP

Roles and responsibilities of district and local municipalities for continued liaison and co-ordination

To successfully ensure **continued liaison and co-ordination** the following operations throughout the West Coast Region will apply:-

- Quarterly meetings of the IDP Managers and LED managers fora throughout the West Coast Region to engage and co-ordinate IDP and LED related matters that will arise (Fora can meet more frequently based on the need)
- Quarterly meetings of the District Public Participation forum meeting of the West Coast to engage and co-ordinate IDP public participation matters (Forum can meet more frequently based on the need)

- These meetings will also afford the Senior Manager: IDP, PMS, IGR and ED responsible for IDP) of the West Coast District (the opportunity to monitor and evaluate progress relating to challenges experienced at local level and in consultation with the Municipal Manager make provision for assistance/support in this regard to a particular municipality as well as any IGR referrals or co-ordination which it may necessitate.
- Meetings will take place at least four times per annum.
- Meetings and workshops will be planned under the auspices of the West Coast District Municipality which will influence the integrated Development Planning Processes of the district- and local municipalities.
- Meetings of the forum will be convened and chaired by the West Coast District Municipality, with in-person meeting hosting rotated between the respective municipalities' locations.
- Meetings will take the form of in-person meeting, virtual meetings and hybrid meetings, depending on the circumstances
- Workshops will be determined based on a particular need raised by the district and local municipalities.
- The IDP LED Managers fora reporting to the District Co-ordinating Committee (DCFTECH) will serve as the co-ordinating platform for the processes of District- and Local IDP formulation, co-ordination and alignment.
- The above for a are underscored by the respective Provincial integrated planning and budgeting platforms, presently the SIME, TIME and IDP Indaba engagements

4. Public participation

Objectives of Public Participation

The objectives of community participation should be to: –

provide information to citizens;

- getting information from and about citizens;
- improving public decisions, programmes, projects and services;
- enhancing acceptance of public decisions, programmes, projects and services.

Information obtained through any public participation process which may impact on the IDP of another municipality (local or district), or which have to be included in the relevant municipality's IDP, must be relayed to the IDP Managers of the relevant municipality as soon as possible. The information from the local municipalities regarding their public participation needs also need to be forwarded to the district municipality as soon as the municipalities has done their analysis of their community needs. This will be done for the purposes of documenting municipal level needs and priorities as well as for IGR referrals and co-ordination as necessary.

In terms of the functional competencies of a district Municipality as contained in the municipal structures act, these needs will be attended to by the district municipality during public participation sessions attended or as referred to by the local municipality.

Feedback to the public must be regarded equally important as participation, and must be undertaken in a structured way both at district and local level as determined in each municipality's Process Plan.

Public Stakeholder engagement:

- In both the Municipal Structures Act (Structures Act) and the Municipal Systems Act (Systems Act) a statutory framework is established that broadly outlines a system of participatory democracy.
- The national statutory framework allows municipalities to develop, in the words of the Systems Act, 'a culture of municipal governance that **complements** formal representative government with a system of participatory government' (s 16(1)).

A consultative participatory approach should apply throughout the IDP process. The West Coast District Municipality in engaging regarding the IDP Process will utilise the following Structures to ensure local municipality and public stakeholder involvement on a continuous basis.

Municipality level structures:

The District Municipality will jointly participate with B municipalites to share and support a platform at municipal level around the District IDP and any District Municipality functions. The B Municipalities are already utilising various structures to engage pertaining to their Integrated Development Plan and it is encouraged that the West Coast District and Local Municipalities share the platform to engage with these structures during the IDP Processes.

As it is not feasible to participate at all sub-municipal level engagements, municipal level structures will be utilised in all municipalities where they exist but at least one sub-municipal level will be engaged per B municipality at both the analysis and feedback phases.

In addition the West Coast District Municipality's representation in the IDP Representative Forums of the **local municipalities** can be ensured as follows:–

- West Coast District Municipality's councillors should participate in the IDP Representative Forums of their various geographic areas.

5. Framework programme and timeframe

The following timeframe will be followed in drafting the IDP:

<u>ACTION</u>	<u>DATE OF COMPLETION</u>
Drafting of Framework & Process Plan	July - August 2022
Submitting Process Schedule to Mayoral Committee for approval	August 2022
IDP Public Stakeholder engagement Process	July 2022- October 2022
IDP Process: Analysis	November 2022
: Strategies	December 2022
: Projects/ Operational	January 2022
: Integration	March 2022
: Review/approval	May 2022

WCMD Mayco and Executive Management Engagements with B-municipalities

The Executive leadership (Mayco and Management) of the District Municipality will engage on a One-on-One basis with the local municipalities where the emphasis will be on the following:

- Challenges experienced by the local municipalities regarding their developmental mandate.

- The support that the district can render to the B Municipalities in order to ensure they fulfil their developmental mandate.
- Understanding the various programmes and projects undertaken by the local municipalities.
- Clearly aligning the district municipality to the development priorities of the Local Municipalities.
- Clearly understanding the role that the B Municipalities want the district to embark on throughout the West Coast Region.
- The district to view whether they are able to provide funding to the local municipalities regarding potential projects that the local municipalities would like to embark on.

Inter Governmental Relations (IGR) Forums according to the IGR framework act Act 13 of 2005, sections 25 and 30:

- District Co-ordinating Forum (DCF)
- District Co-ordinating Forum technical committee (DCFTECH)

Other forums include:

- IDP LED managers forum (West Coast District)
- Districts Integrated Forum □ Provincial IDP Manager's Forum
- Provincial Public Participation Forum
- IDP Innovation Forum (Ad Hoc)

6. IDP & Budget Strategic Management Framework – Time Schedule for 2022 – 2023 (In preparation for 2023/2024 IDP and Budget Process)

1. INTRODUCTION

Integrated development planning (hereafter IDP) is the key tool for local government to fulfil its role and development function in terms of the South African Constitution and other applicable legislation. Integrated development planning is seen as a function of municipal management and part of an integrated system of planning and delivery. The IDP process is meant to arrive at decisions on issues such as municipal budget priorities, land management, social and economic development and institutional transformation in a consultative, systematic and strategic manner.

The IDP process has to provide a participatory platform for community members and stakeholders to identify, discuss and resolve the **needs/ issues** in a municipal area (which may be over-arching issues for the whole district, as well as issues of specific communities or stakeholder groups). This

should be to a level of detail which is required for realistic budgeting and which helps manage the implementation process without much delay.

In terms of Municipal Finance Management Act, No 56 of 2003, Section 21(1)(b) a time schedule must be tabled in council, 10 months before the start of a budget year. The **Time schedule** fulfils the function of an operational framework for the IDP process. It indicates in a simple and transparent manner what needs to happen when and why.

2. LEGISLATIVE REQUIREMENTS

In order to ensure certain minimum quality standards of the IDP review and amendment process and a proper coordination between and within the spheres of government, the IDP review and amendment process and community participation is regulated by the following legislation:

Local Government: Municipal Systems Act, No. 32 of 2000

MSA Section 17: Mechanisms, processes and procedures for community participation

(1) Participation by the local community in the affairs of the municipality must take place through—

- (a) political structures for participation in terms of the Municipal Structures Act;*
- (b) the mechanisms, processes and procedures for participation in municipal governance established in terms of this Act;*
- (c) other appropriate mechanisms, processes and procedures established by the municipality;*
- (d) councillors; and*
- (e) generally applying the provisions for participation as provided for in this Act.*

(2) A municipality must establish appropriate mechanisms, processes and procedures to enable the local community to participate in the affairs of the municipality, and must for this purpose provide for—

- (a) the receipt, processing and consideration of petitions and complaints lodged by members of the local community;*
- (b) notification and public comment procedures, when appropriate;*
- (c) public meetings and hearings by the municipal council and other political structures and political office bearers of the municipality, when appropriate;*
- (d) consultative sessions with locally recognised community organisations and, where appropriate, traditional authorities; and*
- (e) report-back to the local community.*

(3) When establishing mechanisms, processes and procedures in terms of subsection (2) the municipality must take into account the special needs of—

- (a) people who cannot read or write;*

- (b) people with disabilities;
- (c) women; and
- (d) other disadvantage groups.

Section 25: Adoption of integrated development plans

(2) An integrated development plan adopted by a municipal council in terms of subsection (1) may be amended in terms of section 34 and remains in force until an integrated development plan is adopted by the next elected council.

Section 34: Annual review and amendment of integrated development plan

A municipal council-

- (a) must review its integrated development plan-
 - (i) annually in accordance with an assessment of its performance measurements in terms of section 41; and
 - (ii) to the extent that changing circumstances so demand; and
- (b) may amend its integrated development plan in accordance with a prescribed process.

Section 37: Regulations and guidelines

(1) The Minister may for the purposes of this Chapter make regulations or issue guidelines in terms of section 120 to provide for or to regulate the following matters:

- (e) a process for the amendment of integrated development plans;

Under section 120, read with sections 37, 43 and 49, of the Local Government: Municipal Systems Act, 2000 (Act No. 32 of 2000) the Local Government: Municipal Planning and Performance Management Regulations, 2001 determine the following:

Local Government: Municipal Planning and Performance Regulations, 2001

Section 3: Process for amending integrated development plans

- (1) Only a member or committee of a municipal council may introduce a proposal for amending the municipality's integrated development plan in the council.
- (2) Any proposal for amending a municipality's integrated development plan must be-
 - (a) accompanied by a memorandum setting out the reasons for the proposal; and
 - (b) aligned with the framework adopted in terms of section 27 of the Act.
- (3) An amendment to a municipality's integrated development plan is adopted by a decision taken by a municipal council in accordance with the rules and orders of the council.
- (4) No amendment to a municipality's integrated development plan may be adopted by the municipal council unless-
 - (a) all the members of the council have been given reasonable notice;
 - (b) the proposed amendment has been published for public comment for a period of at least 21 days in a manner that allows the public an opportunity to make representations with regard to the proposed amendment;

- (c) the municipality, if it is a district municipality, has complied with subregulation (5); and*
- (d) the municipality, if it is a local municipality, has complied with subregulation (6)*

(5) A district municipality that considers an amendment to its integrated development plan must-

- (a) consult all the local municipalities in the area of the district municipality on the proposed amendment; and*
- (b) take all comments submitted to it by the local municipalities in that area into account before it takes a final decision on the proposed amendment*

Against the aforementioned legislative framework, the impact of the date of the forthcoming elections and consequent constituting of the district council, this time schedule takes into account any changes that might be necessitated in light of changing circumstances. Said changes will likewise be tabled to council.

3. PUBLIC PARTICIPATION: COMMUNITIES AND STAKEHOLDERS

Public stakeholder engagements will occur annually according to the process plan of the district municipality.



WEST COAST DISTRICT MUNICIPALITY
IDP & BUDGET STRATEGIC MANAGEMENT FRAMEWORK: TIME
SCHEDULE FOR 2022 – 2023
(In preparation for 2023/2024 IDP and Budget Process)

(In accordance with Section 21(1)(b) of the Local Government: Municipal Finance Management Act, No. 56 of 2003 and Section 34 of the Local Government: Municipal Systems Act, No. 32 of 2000 and supporting Regulations of both ACTS)

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
1.	TIME SCHEDULE; SECTION 27 FRAMEWORK IDP & BUDGET PROCESS PLAN – PREPARATION	MFMA s 53		
1.1	IDP/LED/ Public Participation Managers Forum	MSA s21,22,23, 28(3),34; MSA Chapter 4 MFMA s21, 68,77	July 2022 - September 2022	Senior Manager: IDP, PMS, IGR and Economic Development
1.2	Time schedule to be circulated to HODs			Municipal Manager
1.3	Executive Mayoral Committee meeting - recommendation of time schedule			Senior Manager: IDP, PMS, IGR and Economic Development
1.4	IDP Co-ordinating Initiatives /DCFTECH/DCF Implementation (Quarterly)			Municipal Manager
1.5	Council meeting to approve time schedule (at least 10 months before the start of the budget year)			
1.5.1	Council meeting and time schedule approval			
1.6	Provincial Public Participation Forum			Senior Manager: IDP, PMS, IGR and Economic Development
1.7	Provincial IDP Managers' Forum			
1.8	Western Cape Districts Integrated Forum (WCDIF)			
1.9	Place advertisement to notify the public of the approved IDP/ Budget Time Schedule on municipal website and local newspaper			
1.10	Submit the adopted IDP/Budget Time Schedule to the MEC for Local Government and Provincial Treasury		Municipal Manager	

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
1.11	Preparation of Section 27 Framework & IDP Budget Process Plan	MSA 27&28		Senior Manager: IDP, PMS, IGR and Economic Development
2.	ANALYSIS PHASE			
2.1	Community Consultation			
2.1.1	Advertisement of draft SDF for public comment			
2.1.2	Period of public participation on Draft SDF for 60 days (per SPLUMA s20(3))	SPLUMA s20 (3)	January-March 2023	Manager Town & Regional Planning
2.1.3	SDF Review Inter-governmental Steering committee meetings			
2.1.4	Reworked SDF with inputs tabled to Executive Mayoral Committee for notification			
2.2.1	Consultation with role-players/stakeholders & members of the public (B-Municipalities)			IDP Managers Bs
2.2.2	Consultation with ward committees to the review IDP/PMS (B – Municipalities/ C –Municipality)			Senior Manager: IDP, PMS, IGR and Economic Development
2.2.3	Development of ward based plans (B – Municipalities)			
2.2.4	<i>District Consultation in existing Municipal Level IDP Meetings (C – Municipality)</i>			
2.2.4.1	Cederberg (Ward based)			
2.2.4.2	Bergrivier (IDP Rep Forum)	MSA s29	August 2022 - January 2023	IDP Managers Bs
2.2.4.3	Matzikama (IDP Rep Forum)			Senior Manager: IDP, PMS, IGR and Economic Development
2.2.4.4	Saldanha Bay (Ward Based)			
2.2.4.5	Swartland (SMAF)			
2.2.5	<i>District Consultation with Sector Groups as necessary (District Municipality)</i>			
2.2.5.1	Economic Development			
2.2.5.2	Civil Society			
2.2.5.3	Government			
2.2.6	IDP Co-ordinating Initiatives / DCFTECH/DCF Implementation (Quarterly) IDP/ LED Managers Forum		September 2022 -	Senior Manager: IDP, PMS, IGR and

No.	Task Name	Legislative requirements guidelines	Period	Human Resource	
			January 2023	Economic Development	
2.2.7	Provincial Public Participation Forum	MSA Section 24	November 2022 – December 2023		
2.2.8	Western Cape Districts Integrated Forum (WCDIF)				
2.2.9	Provincial IDP Managers Forum				
2.3	Annual Performance Report and Performance Analysis				
2.3.1	Preparation of previous financial year annual performance report.	MFMA - Section 126	July 2022 – August 2022	Senior Manager: IDP, PMS, IGR and Economic Development	
2.3.2	Submit unaudited Annual Performance Report (APR) to the Auditor General of South Africa (AGSA)				
2.3.3	Assess municipal performance and identify where changes are needed for next 3 years [incorporate community inputs] for:	MSA s38-41	September 2022 – January 2023	Senior Manager: IDP, PMS, IGR and Economic Development	
2.3.3.1	the municipality's performance management system (PMS)				
2.3.3.2	the measures and annual performance targets				
2.3.3.3	the baseline information for each measure				
2.4	Financial Analysis				
2.4.1	Assess the financial position and capacity of the municipality	MFMA s 35, 36, 42; MTBPS MSA s74,75 MFMA 54(1)	September 2022 – January 2023	CFO	
2.4.2	Review budget related policies and set new policy priorities for next 3 years				
2.4.3	Determine the funding / revenue potentially available for next three years				
2.4.4	Determine the most likely financial outlook and identify need for changes to fiscal strategies				
2.4.5	Determine factors that can influence budgets for the next 3 years and broad financial parameters				
2.4.6	Refine funding policies including tariff structures				
2.4.7	Discussion of financial analysis at HOD meeting				
2.4.8	Approval of financial analysis				Council
2.4.9	Joint meeting between WCDM and B-Municipalities on financial analysis				WCDM
2.4.10	MAYCO Recommendation - budget to council				Municipal Manager
2.4.11	Council approval of budget				Council

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
2.5	Situational Analysis			
2.5.1	Update information contained in LG-MTEC reports	MSA s26	September 2022 - January 2023	Senior Manager: IDP, PMS, IGR and Economic Development
2.5.2	Examine the current realities and examine changing conditions and new information			
2.5.3	Consider external mechanisms for possible changes to agreements impacting on the next budget	MSA s26	September 2022 - February 2023	Senior Manager: IDP, PMS, IGR and Economic Development
2.5.4	Examine sectoral plans for gaps and priority issues and alignment with SDF proposals and priorities			
2.5.5	Obtain inputs from Councillors and Management with regard to needs and priorities			
2.6	Inter-governmental alignment			
2.6.1	District Alignment Bi-lateral engagement meetings with each B municipality		September 2022 - February 2023	Senior Manager: IDP, PMS, IGR and Economic Development
2.6.2	<i>Provincial Sector alignment Engagements with District and B-Municipalities</i>			
2.6.2.1	Discussion document based on outcome of the above-mentioned workshop circulated to WCDM and B-Municipalities.			
2.6.3	MINMAY Planning: District Mayors present strategic and planning priorities & service delivery challenges		July 2022	Mayor Municipal Manager
2.6.4	Meet and Greet		August 2022	PTM and MMs
2.6.5	HOD MM Engagement: Joint consultation on a round-robin-bases providing further context to the strategic, planning priorities and service delivery challenges.		August 2022	Municipal Manager
2.6.6	PCF Premiers Co-ordinating Forum		September 2022	Provincial and Local Government
2.6.7	MinMay		November 2022	Provincial and Local Government
2.6.8	MinMayTECH		September 2022 November 2022	Provincial and Local Government
2.6.9	Strategic Integrated Municipal Engagement (SIME): Strategic engagements with municipalities on planning priorities and service delivery challenges. Vertical Interface		November 2022	Municipal Manager Management
2.6.10	DCF Planning: District Mayors present strategic, planning priorities & service delivery challenges	November 2022	Mayor	

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
				Municipal Manager
2.6.11	IDP Indaba: Project and budget alignment and implementation of IDP and SDF projects between all three spheres of government		February 2023	Management Senior Manager: IDP, PMS, IGR and Economic Development
2.6.12	Technical Integrated Municipal Engagement (TIME): Technical engagement, governance and mid-year budget assessments and service delivery risks.		February 2023	Management
2.6.13	Provincial Public Participation Forum		February 2023 - March 2023	Senior Manager: IDP, PMS, IGR and Economic Development
2.6.14	Western Cape Districts Integrated Forum (WCDIF)			
2.6.15	Provincial IDP Managers' Forum	MSA Section 24		
3	STRATEGY (Vision, mission, and strategic goals)			
3.1	Workshop with Executive Mayoral Committee and Extended Management on strategic direction to guide the compilation of the IDP and annual budget	MSA s26	September 2022 - October 2022	Municipal Manager
3.2	Submit a quarterly MFMA Sec 52 and audit report on performance measurement to the Municipal Manager and the Audit-and Performance Audit Committee	MBPR Reg 14 Sec 52 MFMA		Senior Manager: IDP, PMS, IGR and Economic Development Internal Audit
3.3	Quarterly audit submission			
4	PROGRAMMES, PROJECTS AND PRELIMINARY CAPITAL BUDGET			
4.1	Priorities and Outputs			
4.1.1	Identify programmes and projects and provide for priorities and outputs desired for next 3 years with updated cost estimates		December 2022 - February 2023	Management
4.1.1.1	Office of the Municipal Manager programme	(MFMA s 68, 77); part of MSA 76-81		Municipal Manager
4.1.1.2	Technical Services programme, inclusive of the SDF			Director: Technical Services
4.1.1.3	Financial Services programme			CFO
4.1.1.4	Administration and Community Services programme			Director: Administration

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
				and Community Services
4.1.2	Commence with the preparation of project plans as part of the budget process (will later be used to compile SDBIP's)			Management
4.1.3	Meetings between Management and Ward Committee members to prioritise (per sector) (B-Municipalities)		December 2022 – February 2022	LM IDP Managers
4.1.4	IDP Co-ordinating Initiatives / DCFTECH/DCF Implementation (Quarterly)			Senior Manager: IDP, PMS, IGR and Economic Development
4.2	Operating Budget			
4.2.1	All relevant information as well as computer printouts to various departments	MFMA s36	December 2022 – February 2023	CFO
4.2.2	All departments prepare 2023/2024 operating budget as well as revised operating budget for 2022/23			Management
4.2.2.1	Office of Municipal Manager programme			Municipal Manager
4.2.2.2	Technical Services programme			Director: Technical Services
4.2.2.3	Financial Services programme			CFO
4.2.2.4	Administration and Community Services programme			Director: Administration and Community Services
4.2.3	Departments submit their draft operating budgets to Financial Services (appointments for meetings will be made beforehand)			Management
4.2.3.1	Office of the Municipal Manager programme			Municipal Manager
4.2.3.2	Technical Services programme			Director: Technical Services
4.2.3.3	Financial Services programme			CFO
4.2.3.4	Administration and Community Services programme			Director: Administration and Community Services

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
4.2.4	Financial Services compiles draft operating budget for 2023/2024 and revised operating budget for 2022/23			CFO
4.2.5	Executive Mayoral Committee meeting on draft operating budget			Municipal Manager
4.2.5.1	Approval draft financial budget 2023/2024			Council
5	APPROVAL	MFMA s 23, 24; MSA Chapter 4 as amended		
5.1	Approval of Draft SDF, Draft IDP amendment, PMS and Annual Budget			
5.1.1	MAYCO Recommendation of draft SDF, Draft IDP amendment to council	MFMA s16,22,23,8	January 2023 – May 2023	Mayoral Committee
5.1.2	Approval of draft SDF, Draft IDP amendment, PMS and Annual Budget	7;M SA s34		Council
5.1.3	Submit a quarterly Sec 52 MFMA and audit report on performance measurement to the Municipal Manager and the Audit-and Performance Audit Committee	MBPR Reg 14 Sec 52 MFMA		Senior Manager: IDP, PMS, IGR and Economic Development Internal Audit
5.1.4	Submit quarterly reports on performance audits to the Municipal Manager and the Audit-and Performance Audit Committee.	MPPM Reg, 2001		Internal Audit
5.1.5	Mid - Year Budget and Performance assessment: Assess the performance of the municipality during the first half of the financial year Sec 72 MFMA report: Mid-year Assessments of plans, budgets and service delivery challenges	MFMA s72		Management
5.1.6	Assess the monthly statements	MFMA s54(1)	January 2023 – May 2023	CFO
5.1.7	Assess the municipality's service delivery performance and the service delivery targets and performance indicators set in the SDBIP	MSA s41		Senior Manager: IDP, PMS, IGR and Economic Development
5.1.8	Assess the past year's annual report, and progress on resolving problems identified in the annual report	MFMA s72 (a)(iii)		Director: Administration and Community Services
5.1.9	Prepare an bi-annual audit report for submission to Council			Internal Audit

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
5.1.10	Compile Annual Report i.t.o. Section 121 of the MFMA	MFMA s121		Director: Administration and Community Services
5.1.11	Executive Mayoral Committee meeting on: (1) Performance Assessment for the first half of the financial year (by 25 January of each year); (2) the Annual Report; and (3) the Bi -Annual Audit Report.			Mayoral Committee
5.1.12	Council meeting on the Annual Report (within 7 months after the end of a financial year) and the bi-annual audit report	MFMA s127, 129, 130 and 131		Council
5.1.13	Submit the Annual Report to the Auditor-General, the relevant provincial treasury and the provincial department responsible for local government in the province.	MFMA 127(5)(b)		Director: Administration and Community Services
5.1.14	Make public the Annual Report for comments and inputs	MFMA 127 (5)(a)(i)(ii)		Mayoral Committee
5.1.15	Executive Mayoral Committee meeting on draft IDP, PMS and annual budget. Also consider Annual Report i.t.o. Section 121 of the MFMA.			Mayoral Committee
5.1.16	Council meeting on draft IDP, PMS and annual budget (at least 90 days before the start of the budget year). Council must also consider the Annual Report and adopt an oversight report containing the Council's comments on the report	MFMA s 16, 22, 23, 87; MSA s 34		Council
5.1.17	Place Annual Report on the Municipal Website	MFMA s127 (5)(a)(i)(ii)		Director: Administration and Community Services
5.1.18	Make public the Oversight Report (within 7 days of its adoption)	MFMA 129 (3)		Director: Administration and Community Services
5.1.19	Submit the Annual Report and Oversight Report to the provincial legislature.	MFMA - Sec 132(1) & (2)		Director: Administration and Community Services
5.2	Consultation and Refinement			
5.2.1	Make public the Draft SDF, Draft IDP, PMS, annual budget and other required documents for public comments and submissions	MFMA s22,37; MSA Chapter 4	January 2023 – May 2023	Senior Manager: IDP, PMS, IGR and Economic Development
5.2.2	Publish the proposed Draft SDF, Draft IDP, PMS and annual budget for public comment	MSA s42		LM IDP Managers
5.2.3	Ward Committee consultation (B-Municipalities)			Senior Manager: IDP, PMS, IGR and
5.2.4	Meeting with ward committees to compile IDP / PMS (B-Municipalities/ C-Municipality, 1 Ward level meeting per B municipality)	MSA s29		

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
				Economic Development & LM IDP Managers
5.3	District Consultation in existing Municipal Level IDP Meetings (C-Municipality)			
5.3.1	Cederberg (Ward based)	MSA s29	April 2023	Senior Manager: IDP, PMS, IGR and Economic Development & LM IDP Managers
5.3.2	Bergrivier (IDP Rep Forum)			
5.3.3	Matzikama (IDP Rep Forum)			
5.3.4	Saldanha Bay (Ward Based)			
5.3.5	Swartland (SMAF)	MSA s29	April 2023 - May 2023	Senior Manager: IDP, PMS, IGR and Economic Development & LM IDP Managers
5.3.4	WOSA Whole of Society Approach (Saldanha Bay Municipality)		April 2023 - May 2023	Provincial Government
5.4	Council considers submissions made by the local community, National or Provincial Treasury, national or provincial organs of state or municipalities		May 2023	Council
5.5	Final Approval and Final IDP amendment, PMS and Annual Budget	MFMA s 16, 24, 26, 53		
5.5.1	Executive Mayoral Committee meeting to consider the submissions and, if necessary, to revise the budget	MFMA s16,24,26,53	May 2023	Mayoral Committee
5.5.2	Special Council meeting to approve IDP amendment, Performance Management Measures and targets and the annual budget (at least 30 days before the start of the budget year)			Council
5.5.2.1	Council approves final IDP amendment and Budget 2023/2024			
5.5.3	Consultation Draft SP: Consultation on a Municipal Single Support Plan		May 2023	Provincial Departments & Municipalities HODs, MMs & Senior Officials
5.5.4	Single Support Plan: Finalisation of Municipal Single Support Plan		June 2023	

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
5.5.5	Provincial Public Participation Forum		May 2023 – June 2023	Senior Manager: IDP, PMS, IGR and Economic Development
5.5.6	Western Cape Districts Integrated Forum (WCDIF)			
5.5.7	Provincial IDP Managers' Forum	MSA Section 24		
6	FURTHER ACTION			
6.1	Public Notice			
6.1.1	Place the IDP, Annual budget, all budget-related documents and all budget-related policies on the website	MFMA s 75, 87	May 2023 – July 2023	Senior Manager: IDP, PMS, IGR and Economic Development
6.1.2	Publish tariffs for 2023/24 for public notice	MFMA s 75, 87, 68		CFO
6.1.3	Submit a copy of the IDP amendment to the MEC for local government (within 10 days of the adoption of the plan)	MSA - Section 32		Senior Manager: IDP, PMS, IGR and Economic Development
6.1.4	Publicise a summary of the IDP and Budget (within 14 days of the adoption of the plan)	MSA – Section 25 (4)(b)		
6.1.5	Submit approved budget to National and Provincial Treasuries	MFMA - Sec 24(3) MBRR - Reg 20		CFO
6.1.4	Give notice to the public of the adoption of the IDP (within 14 days of the adoption of the plan) and budget (within 10 working days)	MBRR - Reg 18 MSA - Sec 25(4)(a)(b)		CFO & Senior Manager: IDP, PMS, IGR and Economic Development
6.2	SDBIP , Annual Performance Agreements and Annual Performance Report			
6.2.1	Submit to the Executive Mayor a draft SDBIP for the budget year (no later than 14 days after the approval of an annual budget)	MFMA - Sec 69(3)(a)	May 2023 – July 2023	Municipal Manager
6.2.2	Executive Mayor takes all reasonable steps to ensure that the SDBIP is approved (within 28 days after approval of the budget)	MFMA - Sec 53(1)(c)(ii)		
6.2.3	Submit to the Executive Mayor drafts of the Annual Performance agreements (submit drafts 14 days before	MFMA 53(3)(b)		

No.	Task Name	Legislative requirements guidelines	Period	Human Resource
	the final approval of SDBIP and are made public no later than 14 days after approval of the SDBIP)			
6.2.4	Place the performance agreements and all service delivery agreements on the website	MFMA 53(3)(b)		
6.2.4.1	Make public the projections, targets and indicators as set out in the SDBIP (no later than 14 days after the approval of the SDBIP) and submit to National and Provincial Treasuries (no later than 10 working days after the approval of the SDBIP)	MFMA Section 53(3)(a); 23 MSA s38 - 45, 57(2) MBRR Reg 19	May 2023 – July 2023	Senior Manager: IDP, PMS, IGR and Economic Development Internal Audit
6.2.4.2	Make public the performance agreements of Municipal Manager and senior managers (no later than 14 days after the approval of the SDBIP)	MFMA Section 53(3)(b)		
6.2.4.3	Submit copies of the Performance Agreements to Council and the MEC for local government	MFMA s53,23 MSA s38-45, 57(2)		
6.2.5	Submit a quarterly MFMA Sec 52 and audit report on Performance Measurement to the Municipal Manager and the Audit-and Performance Audit Committee	MBPR Reg 14 Sec 52 MFMA		
6.2.6	Prepare a bi-annual audit report for submission to Council	MBPR Reg 14 Sec 52 MFMA		