

PROCESS PLAN

to guide the planning, drafting, adoption and review of the
2017-2022 SWARTLAND INTEGRATED DEVELOPMENT PLAN
as well as the
SWARTLAND SPATIAL DEVELOPMENT FRAMEWORK



31 August 2016

IDP Process Plan

Compiled in terms of
Sections 28 and 29 of the Municipal Systems Act, No 32 of 2000

Adopted by the Council on 31 August 2016

The Integrated Development Plan 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 Integrated Development Plan –

- *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 initially drafted and thereafter reviewed annually in consultation with the local community as well as interested organs of state and other role players;*
- *guides and informs all planning and development, and all decisions with regard to planning, management and 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.*

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1 INTRODUCTION

1.1. Point of departure

Integrated development planning is the key tool for local government to cope with its role and function in terms of the SA Constitution and other applicable legislation. In contrast to the role municipal strategic planning has played in the past, integrated development planning is now seen as a function of municipal management, as 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 integrated development planning process has to provide a forum for identifying, discussing and resolving the **real issues** in a municipality (which may be over-arching issues for the whole municipality, as well as issues of specific communities or stakeholder groups) to a level of detail which is required for realistic costing and which helps manage the implementation process without much delay.

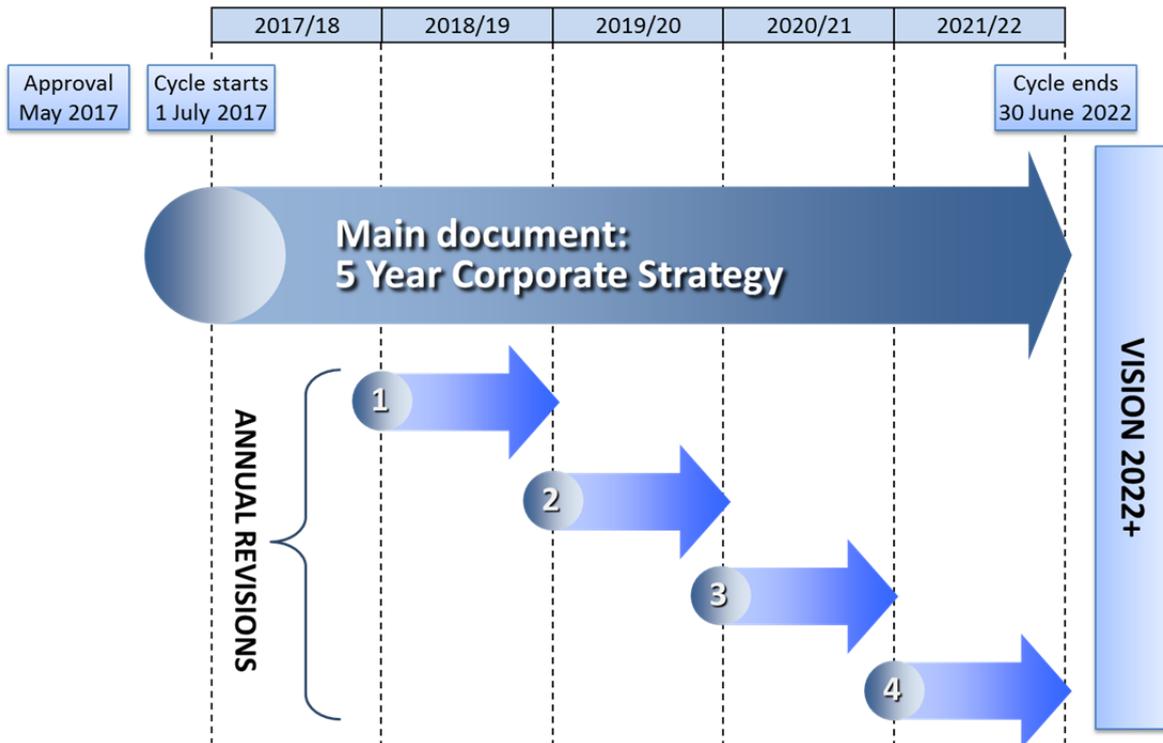
The **Process Plan** fulfils the function of a business plan or an operational framework for the IDP process. It says in a simple and transparent manner what has to happen when, by whom, with whom, and where, and it includes a budget.

1.2. Area of the IDP

The IDP will be applicable to the Swartland Municipal Area which includes the following towns and settlements: Malmesbury, Abbotdale, Kalbaskraal, Chatsworth, Riverlands, Moorreesburg, Koringberg, Darling, Yzerfontein, Riebeek West and Riebeek Kasteel.

The geographic size of the municipal area is approximately 3 700 square kilometres.

1.3. Five year cycle of the IDP



1.4. Phases of the annual process

The IDP process normally goes through the following phases during the course of a year:

Phase	Tasks	Mechanisms
Analysis	<i>External analysis:</i>	
	<ul style="list-style-type: none"> ▪ Spatial ▪ Social ▪ Economic ▪ Environmental ▪ Sector needs and issues 	<ul style="list-style-type: none"> ▪ Sector plans ▪ Spatial Development Framework ▪ Stakeholders discussions ▪ Annual customer satisfaction survey
	<i>Compilation of area plans:</i>	
	<ul style="list-style-type: none"> ▪ Ward profiles ▪ Services backlogs ▪ Priority issues 	<ul style="list-style-type: none"> ▪ Ward committee/ ward meetings and workshops ▪ Inputs by departments
	<i>Internal analysis:</i>	
<ul style="list-style-type: none"> ▪ Critical issues / challenges ▪ Minimum service levels 	<ul style="list-style-type: none"> ▪ In-house exercise by departments ▪ Performance assessment 	
	<i>Inter-governmental alignment:</i>	
	Align with National and Provincial Policies	Desk top study by Strategic Manager
Strategy and action plan	Council and Management discuss strategic issues such as vision and mission, future directions, strategic goals and objectives, as well as programmes, actions, key performance indicators and targets for each strategic objective.	<ul style="list-style-type: none"> ▪ Strategy workshops ▪ Stakeholder discussions ▪ In-house exercise by Management Team
Approval of draft IDP and draft annual budget	Finalise and approve draft IDP and draft annual budget	In-house preparation of the relevant documentation and submission to Council
Consultation and refinement	<ul style="list-style-type: none"> ▪ Make public the draft IDP and draft annual budget for comments and submissions. ▪ Submit the draft annual budget to National and Provincial Treasury, prescribed national or provincial organs of state and to other municipalities affected by the budget. ▪ Consult the West Coast District Municipality on the draft IDP. ▪ Consult the local community and other stakeholders 	<ul style="list-style-type: none"> ▪ In-house exercise by Director Financial Services and Strategic Manager ▪ Public meetings & workshops ▪ SMAF meeting
Final approval	<ul style="list-style-type: none"> ▪ Council approves the final IDP and final annual budget 	In-house preparation of the relevant documentation and submission to Council

2 LEGAL REQUIREMENTS

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

MUNICIPAL SYSTEMS ACT, NO 32 OF 2000 (MSA) SECTION 28:

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

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

SECTION 29(1):

The process 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.*

3 PREPARATION FOR THE PROCESS

The result of the preparation process should not only be a document (the Process Plan), but also a well prepared council and management, confident about the task ahead. In the Process Plan -

- Organisational arrangements are established and the membership of committees and forums is clarified.
- Roles and responsibilities are clarified and internal human resources allocated accordingly.
- The legal requirements, principles and functions of community and stakeholder participation during the IDP process are clarified.
- Mechanisms and procedures for alignment with external stakeholders such as other municipalities, districts and other spheres of government are looked at.
- An example of a table of contents for the IDP is provided.
- Legislation and policy requirements that have to be considered in the course of the IDP process are provided. The list contains documents, guidelines, plans and strategies from the provincial and national sphere of government.

This preparation for the IDP compilation process is a task of municipal management. Individual tasks may be delegated but the process remains the accountability of the Management Team.

4 INVOLVEMENT OF THE COMMUNITY AND STAKEHOLDERS

4.1 Organisational arrangements

The municipality needs to establish a set of organisational arrangements to -

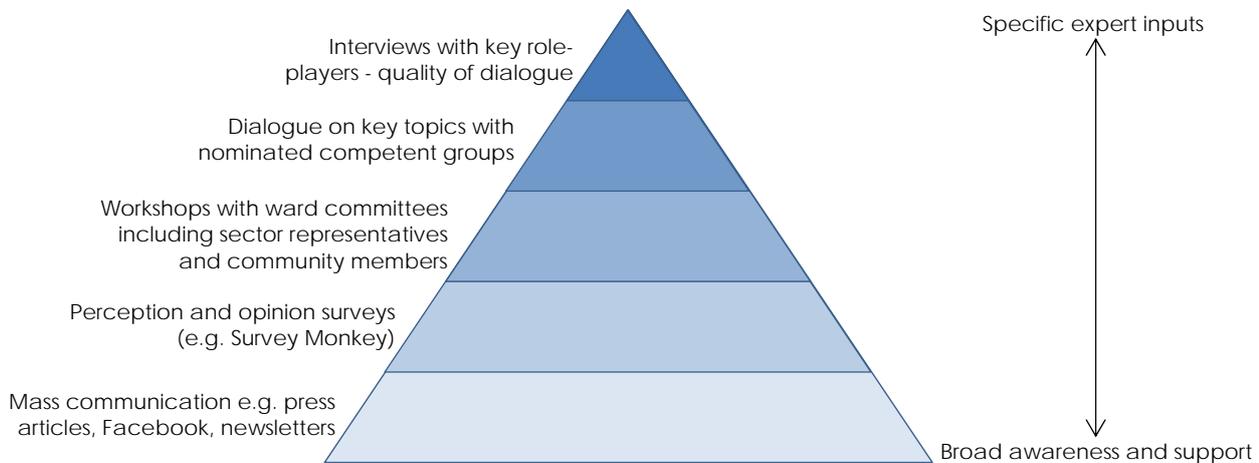
- institutionalise the participation process;
- effectively manage outputs; and
- give affected parties access to contribute to the decision-making process.

The Municipality should consider existing arrangements, use and adapt them if necessary, and avoid duplication of mechanisms. This section deals with the organisational structure and the terms of reference for each of the arrangements/structures.

4.2 Structured participation

The IDP process and the participation of the community in this process have to be **structured**.

The involvement and inputs of the community and stakeholders will be obtained in the manner depicted in the following picture:



4.3 Ward committees

The role of the Ward Committees with respect to the IDP is to -

- Assist the ward councillor in identifying challenges and needs of residents.
- Provide a mechanism for discussion and negotiation between the stakeholders within the ward.
- Advise and make recommendations to the ward councillor on matters and policy affecting the ward.
- Disseminate information in the ward.
- Ensure constructive and harmonious interaction between the Municipality and community.
- Interact with other forums and organisations on matters affecting the ward.
- Draw up a ward plan that offers suggestions on how to improve service delivery in the particular ward.
- Monitor the implementation process concerning its area.

The chairperson of the Ward Committee is the Ward Councillor of that particular ward.

4.4 Swartland Municipal Advisory Forum

The Swartland Municipal Advisory Forum (SMAF) functions as the IDP Representative Forum and comprises of two members from each ward committee (24 members) as well as any other role players or stakeholders the Executive Mayor wishes to co-opt onto the Forum for one or more meetings or for a specific purpose.

The sole purpose of the SMAF will be to advise the Executive Mayor on matters relating to the IDP. It will not have any decision making powers.

5 ROLES AND RESPONSIBILITIES

5.1 Activities and outputs

It is one of the pre-requisites of a smooth and well organised IDP process that all role players are fully aware of their own and of other role players' responsibilities. Therefore, it is one of the first preparation requirements for the IDP process to ensure that there is a clear understanding of all required roles, and of the persons or organisations that can assume those roles. This section deals with:

- The roles which the municipality has to play in the IDP process in relation to the roles which external role players are expected to play.

- The further specification of roles within the Municipality and the responsibilities related to that role in detail.

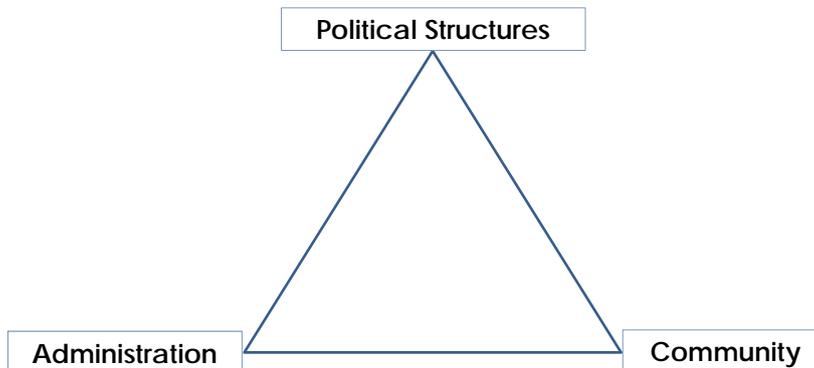
5.2 Roles and responsibilities within Government

Role Player	Roles and Responsibilities
Local Municipality	<ul style="list-style-type: none"> ▪ Prepare and adopt the IDP Process Plan. ▪ Undertake the overall management and co-ordination of the IDP process which includes ensuring that : <ul style="list-style-type: none"> - all relevant role-players are appropriately involved; - appropriate mechanisms and procedures for community participation are applied; - events are undertaken in accordance with the approved time schedule; - the IDP relates to the real burning issues in the municipality; and - the sector planning requirements are satisfied. ▪ Prepare and adopt the IDP. ▪ Adjust the IDP in accordance with the MEC's proposal. ▪ Ensure that the annual business plans, budget and performance management system are linked to and based on the IDP.
District Municipality	<ul style="list-style-type: none"> ▪ Same roles and responsibilities as local municipalities but related to the preparation of a District IDP. The District Municipality must also prepare a District Framework (Sec 27 of the MSA). ▪ Fulfil a coordination and facilitation role by - <ul style="list-style-type: none"> - ensuring alignment of the IDP's of the municipalities in the district council area; - ensuring alignment between the district and local planning; - facilitation of alignment of IDP's with other spheres of government and sector departments; and - preparation of joint strategy workshops with local municipalities, provincial and national role-players and other subject matter specialists.
Provincial Government	<ul style="list-style-type: none"> ▪ Ensure horizontal alignment of the IDP's of the district municipalities within the province. ▪ Ensure 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"> - guiding the provincial sector departments' participation in and their required contribution to the municipal IDP process; and - guiding them in assessing draft IDP's and aligning their sector programmes and budgets with the IDP's. ▪ Efficient financial management of provincial IDP grants. ▪ Monitor the progress of the IDP processes. ▪ Facilitate resolution of disputes related to IDP. ▪ Assist municipalities in the IDP drafting process where required. ▪ Organise IDP-related training where required. ▪ Co-ordinate and manage the MEC's assessment of IDP's.

5.3 Roles and responsibilities - Municipality and stakeholders

Systems Act Section 2(b) - A municipality consists of -

- (i) the political structures and administration of the municipality; and
- (ii) the community of the municipality



POLITICAL STRUCTURES:

Structures Act Section 56(2) - Functions and powers of executive mayors

The executive mayor must –

- (a) identify the needs of the municipality;
- (b) review and evaluate those needs in order of priority;
- (c) recommend to the municipal council strategies, programmes and services to address priority needs through the **integrated development plan**, and the estimates of revenue and expenditure, taking into account any applicable national and provincial development plans; and
- (d) recommend or determine the best way, including partnership and other approaches, to deliver those strategies, programmes and services to the maximum benefit of the community.

Systems Act Section 30 - Management of drafting process

The executive mayor of a municipality 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.

ADMINISTRATION:

Systems Act Section 55(1) - Municipal managers

As head of administration the municipal manager of a municipality is, subject to the policy directions of the municipal council, responsible and accountable for-

- (a) the formation and development of an economical, effective, efficient and accountable administration-
 - (i) equipped to carry out the task of implementing the municipality's **integrated development plan** in accordance with Chapter 5;
 - (ii) operating in accordance with the municipality's performance management system in accordance with Chapter 6; and
 - (iii) responsive to the needs of the local community to participate in the affairs of the municipality;
- (b) the management of the municipality's administration in accordance with this Act and other legislation applicable to the municipality;
- (c) the implementation of the municipality's **integrated development plan**, and the monitoring of progress with implementation of the plan;

COMMUNITY:

Systems Act Section 29(1) - Process to be followed

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

(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.

The table below indicates the roles and responsibilities of the different role players.

Role Player	Roles and Responsibilities	Objectives	Objectives for all role players
Executive Mayor (together with the Mayoral Committee) (process "owner", accountable)	<ul style="list-style-type: none"> ▪ Decide on planning process: nominate persons in charge ▪ Monitor planning process ▪ Responsible for the overall management, co-ordination and monitoring of the process and drafting of the IDP (to make sure that all relevant actors are involved) 	<ul style="list-style-type: none"> ▪ Increased ownership and accountability ▪ More appreciation of the merit of the process/ plan ▪ More openness to new / different ideas ▪ Greater commitment to the process / plan ▪ Be more accessible to the public ▪ Get buy-in from the community ▪ Improved communication to manage expectations ▪ Communicate limited resources 	<ul style="list-style-type: none"> ▪ Greater participation / involvement ▪ High quality dialogue ▪ As simple and easy as possible to participate / contribute
Proportional councillors, ward councillors, ward committee members	<ul style="list-style-type: none"> ▪ Link integrated development planning process to their constituencies/wards ▪ Organise public participation 	<ul style="list-style-type: none"> ▪ 	
Municipal Manager and Management Team (Responsible)	<ul style="list-style-type: none"> ▪ Provide technical/sector expertise and information ▪ Provide inputs related to the various planning steps ▪ Summarise / digest / process inputs from the participation process ▪ Discuss / comment on inputs from specialists 	<ul style="list-style-type: none"> ▪ 	
Strategic Management Office (Process facilitator)	Day-to-day management of the drafting process on behalf of the Municipal Manager (to ensure a properly managed and organised planning process)	More productive and efficient process management	
Strategic Partners <ul style="list-style-type: none"> ▪ Public sector organisations ▪ Key business people ▪ Business and agricultural societies ▪ NGO's and NPO's ▪ Sector representatives 	Represent interests and contributing knowledge and ideas		

Role Player	Roles and Responsibilities	Objectives	Objectives for all role players
Citizens	Represent interests and contributing knowledge and ideas		

6 INTER-GOVERNMENTAL ALIGNMENT

The IDP requires alignment with other spheres of government at different stages during the process. Before starting with the IDP process municipalities need to understand where alignment should take place and through which mechanism this can best be achieved. Alignment is the instrument to synchronize and integrate the IDP process between different spheres of government. The alignment process must reveal how National and Provincial Government and the District Municipality could tangibly assist this Municipality in achieving its developmental objectives.

The desired outcome of inter-governmental alignment is –

- to make government as a whole work together;
- to improve the impact of its programmes; and
- to work towards achieving common objectives and outcomes,

particularly with respect to economic growth for job creation and addressing the needs of the poor.

Efficient performance of government, integration and alignment across all spheres of government can be realized through focused implementation.

The alignment process is co-ordinated by the West Coast District Municipality. Alignment meetings take place on district level, but with the involvement of all local municipalities.

7 IDP CONTENT

7.1 Legally required content of a five year IDP

Section 26 of the MSA: Core components of integrated development plans

An integrated development plan must reflect-

- (a) *the municipal council's vision for the long term development of the municipality with special emphasis on the municipality's most critical development and internal transformation needs;*
- (b) *an assessment of the existing level of development in the municipality, which must include an identification of communities which do not have access to basic municipal services;*
- (c) *the council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;*
- (d) *the council's development strategies which must be aligned with any national or provincial sectoral plans and planning requirements binding on the municipality in terms of legislation;*
- (e) *a spatial development framework which must include the provision of basic guidelines for a land use management system for the municipality;*
- (f) *the council's operational strategies;*
- (g) *applicable disaster management plans;*
- (h) *a financial plan, which must include a budget projection for at least the next three years; and*
- (i) *the key performance indicators and performance targets determined in terms of section 41.*

Regulation 2 of the 2001 Municipal Planning and Performance Management Regulations:

Detail of integrated development plan

- (1) *A municipality's integrated development plan must at least identify-*
 - (a) *the institutional framework, which must include an organogram, required for-*
 - (i) *the implementation of the integrated development plan; and*
 - (ii) *addressing the municipality's internal transformation needs, as informed by the strategies and programmes set out in the integrated development plan;*

- (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 integrated development plan 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 integrated development plan 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 integrated development plan 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 integrated development plans 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.

7.2 Suggested table of contents

The form and content of a five year IDP are largely subject to the discretion of a Municipality. The following table of contents serves only as a guide:

- Foreword by the Executive Mayor
- Foreword by the Municipal Manager
- Introduction and Background
 - Context
 - Integrated development planning
 - Legal status of the IDP
 - Third generation IDP's
 - Relationship between the IDP, budget, performance management and risk management
 - The IDP and area plans
- The planning process
 - Roles and responsibilities
 - Five year cycle of the IDP
 - First year process followed
- The Organisation
 - Section 53 role clarification
 - The council and council committees
 - The administration
- Intergovernmental policy alignment
 - National
 - Provincial
 - District Municipality
- Sector plan alignment
- Status Quo information
 - Current reality
 - Opportunities
 - Intergovernmental initiatives
 - Challenges
- Strategy
 - The Municipality's vision and mission
 - Leadership philosophy and values
 - The Municipality's five year strategy and action plan
 - General indicators in terms of the Municipal Planning and Performance Management Regulations, 2001
- Expenditure frameworks: all spheres of government
 - Provincial spending in the municipal area
 - Allocations in terms of the Division of Revenue Bill (DORA)
 - Allocations in terms of Provincial Gazette Extraordinary
 - Capital budget per department
 - Capital budget per IDP strategic outcome
 - Operating budget per IDP strategic outcome

ANNEXURES

- Profile of Swartland
 - Demographics
 - Social development and well-being
 - Access to housing
 - Access to municipal services
 - Economic performance
- External analysis
 - Client satisfaction survey
 - Area plans
- Status of sector plans and policy

8 ANNUAL REVISION OF THE IDP

8.1 Legal requirements

MSA 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.

8.2 Purpose of a review

The IDP has to be reviewed annually in order to:

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

For the IDP to remain relevant the municipality must assess implementation performance and the achievement of its targets and strategic objectives. In the light of this assessment the IDP is reviewed to reflect the impact of successes as well as corrective measures to address problems. The IDP is also reviewed in the light of changing internal and external circumstances that impact on the priority issues, outcomes and outputs of the IDP.

The 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.

The purpose of the annual review is therefore to -

- reflect and report on progress made with respect to the strategy in the 5 year IDP;
- make adjustments to the strategy if necessitated by changing internal and external circumstances that impact on the appropriateness of the IDP;
- determine annual targets and activities for the next financial year in line with the 5 year strategy; and
- inform the municipality's financial and institutional planning and most importantly, the drafting of the annual budget.

8.3 What the review is not

- The Review is not a replacement of the 5 year IDP.
- The Review is not meant to interfere with the long-term strategic orientation of the municipality to accommodate new whims and additional demands.

9 IDP SOURCE DOCUMENTS

The Integrated Development Planning process is guided by a number of legal and policy documents that impose a range of demands and requirements on the Municipality. The list below contains the some of the most important IDP source documents:

Acts

Constitution of South Africa (1996)

Municipal Structures Act (117 of 1998)

Municipal Systems Act (32 of 2000)

Disaster Management Act (57 of 2002)

Municipal Finance Management Act (56 of 2003)
Intergovernmental Relations Framework Act, 2005 (Act No. 13 of 2005)
Spatial Planning and Land Use Management Act (16 of 2013)

Regulations

Municipal Planning and Performance Management Regulations (Aug 2001)
Municipal Budget and Reporting Regulations (April 2009)
Regulations in terms of the Spatial Planning and Land Use Management Act (March 2015)

National policy

National Development Plan (2012)
Medium-Term Strategic Framework: 2014 – 2019
Back to Basics Approach - September 2014

Provincial policy

Western Cape's Provincial Strategic Plan: 2014-2019
Western Cape Provincial Spatial Development Framework - March 2014

ANNEXURE A: PROGRAMME WITH TIMEFRAMES IN TERMS OF SECTION 29 OF THE MSA

ACRONYMS

MSA	Municipal Systems Act 32 of 2000
MPPMR	Municipal Planning and Performance Management Regulations, 2001
MFMA	Municipal Finance Management Act 56 of 2003
MPR	Municipal Performance Regulations for Municipal Managers and Managers directly accountable to Municipal Managers, 2006
MBRR	Municipal Budget and Reporting Regulations, 2009
SPLUMA	Spatial Planning and Land Use Management Act, 2013
WC LUPA	Western Cape Land Use Planning Act, 2014
SDF	Spatial Development Framework
BYLAW	Swartland Municipality : Land Use Planning Bylaw, 2015

AUGUST 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	1	2	3	4	5	6	3 Aug: Municipal elections
7	8	9	10	11	12	13	9 Aug: National Women's Day; 11 Aug: Council Meeting
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31				31 Aug: Council Meeting

Task	Date	Legal Reference
Process Plan:		MSA Section 28:
<ul style="list-style-type: none"> Consult the local community 	15 Jun - 26 Aug	(1) Each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan.
<ul style="list-style-type: none"> Submit to Council for confirmation of the process started by old Council 	11 Aug	
<ul style="list-style-type: none"> Submit to Council for approval 	31 Aug	(2) The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, consult the local community before adopting the process.
Submit annual financial statements and annual performance report to the Auditor-General for auditing (<i>within two months after the end of the financial year</i>)	By 31 Aug	MSA Section 126(1)(a): The accounting officer of a municipality must prepare the annual financial statements of the municipality and, within two months after the end of the financial year to which those statements relate, submit the statements to the Auditor-General for auditing

SEPTEMBER 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
				1	2	3	
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	14 Sep: Executive Mayoral Committee
18	19	20	21	22	23	24	24 Sep: Heritage Day
25	26	27	28	29	30		29 Sep: Council; 30 Sep - 10 Oct: School holiday

Task	Date	Legal Reference
IDP Process Plan:		MSA Section 28:
<ul style="list-style-type: none"> Submit to Department of Local Government and the West Coast District Municipality for comments 	2 Sep	(3) A municipality must give notice to the local community of particulars of the process it intends to follow.
<ul style="list-style-type: none"> Give notice of the approved process plan through local media 	6+7 Sep	

Task	Date	Legal Reference
Strategy Workshop 1 (councillors, municipal manager, directors, selected senior managers and SDF project committee) to reconcile views and opinions of the political structures and administration.	15 Sep	MSA Section 56(2) The executive mayor must - (a) identify the needs of the municipality; (b) review and evaluate those needs in order of priority
Short evaluation synthesis of SDF (Identify strengths, weaknesses, opportunities constraints)	Sep	LUPA S. 10
Commence with the multi-year capital and operating budget	Sep	
Finalise first draft of annual report incorporating financial and non-financial information on performance, audit reports and annual financial statements	Sep according to AG meeting	
Strategy Workshop 2 (municipal manager, directors, selected senior managers and SDF project committee) to suggest solutions that contribute most to the Strategic Goal(s) applicable to each department.	27 Sep	
Identify top key strategic issues in SDF	Sep	
Review the Long term Financial Plan	Sep-Nov	MSA Section 26(h): An integrated development plan must reflect a financial plan, which must include a budget projection for at least the next three years.

OCTOBER 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
						1	30 Sep - 10 Oct: School holiday
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	12 Oct: Executive Mayoral Committee
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31						

Task	Date	Legal Reference
Internal Analysis – <ul style="list-style-type: none"> critical issues / challenges with respect to every service minimum service levels institutional financial performance Surrounding municipalities 	Oct+Nov	LUPA S. 15
Community involvement <ul style="list-style-type: none"> Interviews with key role-players Dialogue on key topics with nominated competent groups Customer satisfaction survey (Survey Monkey) Mass communication e.g. press articles, Facebook, newsletters 	Oct+Nov	MSA Section 29(1)(b): The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must 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.

Task	Date	Legal Reference
Prepare Vision Statement and Programme for SDF - <ul style="list-style-type: none"> 10-20 year vision Finalise population growth estimates, economic activities, employment trends, housing demand, land demand/supply Identify development corridors, activity spines, economic nodes, transport routes, open space systems, ecological corridors, densification strategy of urban areas 		<i>SPLUMA S.21 b, c, d, e, and f</i> <i>LUPA S.10 (e) I, iii and v</i> <i>Bylaw S.8</i>
SDF composite synthesis		
Commence with the compilation of new area plans	Oct	

NOVEMBER 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
		1	2	3	4	5	
6	7	8	9	10	11	12	9 Nov: Executive Mayoral Committee
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	24 Nov: Council
27	28	29	30				

Task	Date	Legal Reference
Workshop with SMAF members and other invited stakeholders	Nov	
Sessions with Ward Committees including sector representatives and community members (All sessions start at 19:00 except Yzerfontein that starts at 16:00): <ul style="list-style-type: none"> Rozenhof Community Hall Yzerfontein Community Hall Darling Community Hall Riebeeck West Town Hall Ilinge Lethu Thusong Sentrum Wesbank Community Hall Chatsworth AGS Church Hall Abbotsdale Community Hall 	21-30 Nov	<i>MSA Section 29(1)(b): The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for-</i> <i>(i) the local community to be consulted on its development needs and priorities;</i> <i>(ii) the local community to participate in the drafting of the integrated development plan; and</i> <i>(iii) organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the integrated development plan.</i>
Strategy Workshop 3 (councillors, municipal manager, directors, selected senior managers and SDF project committee) to consolidation all strategic inputs and to formulate the first draft of a new Strategy Chapter of the IDP and amendment to SDF.	30 Nov	

DECEMBER 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
				1	2	3	
4	5	6	7	8	9	10	7 Dec: Schools close
11	12	13	14	15	16	17	14 Dec: Executive Mayoral Committee; 16 Dec: Day of Reconciliation
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	25 Dec: Christmas Day; 26 Dec: Day of Goodwill

Task	Date	Legal Reference
Finalise first draft of departmental operational plans and SDBIP for review against strategic priorities	Dec+Jan	

Task	Date	Legal Reference
Submit draft adjustments budget to Budget Steering Committee	Dec/Jan	
Prepare 1 st Draft of amendment of SDF	Dec/Jan	SPLUMA S.7 & 21 LUPA S.10 Bylaw S.7

JANUARY 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
1	2	3	4	5	6	7	1 Jan: New Year's Day; 2 Jan: Public holiday
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	18 Jan: Schools open; 18 Jan: Executive Mayoral Committee
22	23	24	25	26	27	28	26 Jan: Council
29	30	31					

Task	Date	Legal Reference
Budget: <ul style="list-style-type: none"> ▪ Finalise in the prescribed formats incorporating National & provincial budget allocations ▪ Integrate and align to IDP documentation and draft SDBIP ▪ Finalise budget policies 	Jan+Feb	
Finalise KPI's and annual performance targets	Jan+Feb	
First draft of the amendment SDF <ul style="list-style-type: none"> ▪ Submit to Mayoral Committee ▪ Submit to Council 	18 Jan 26 Jan	SPLUMA S20(2) <i>The municipal spatial development framework must be prepared as part of a municipality's integrated development plan with the provisions of the MSA</i> WCLUPA S13(1) <i>The municipality must submit a draft amendment of a spatial development framework to the provincial Minister for written comment.</i> BYLAW <i>The project committee must compile a first draft of the amendment of the municipal spatial development framework and submit to the Council to approve the publication thereof for public comment.</i> <i>Bylaw S.7(1)(b)</i>

FEBRUARY 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4	
5	6	7	8	9	10	11	8 Feb: Executive Mayoral Committee
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28					

Task	Date	Legal Reference
Finalise the draft capital and operating budget and budget related policies	Feb+Mar	
Finalise area plans	Feb	
Note any provincial and national allocations to municipalities for incorporation into budget	Feb	
Submit draft amendment of the Spatial Development Framework to Provincial Minister for written comments	1 Feb	WCLUPA S.13(1)(a) S.7(1)(c)

Task	Date	Legal Reference
<ul style="list-style-type: none"> Invite the public to submit written representation on amendment of SDF Open days to be held - <i>Yzerfontein Community Hall</i> <i>Darling Community Hall</i> <i>Wesbank Community Hall</i> <i>Riebeeck West Town Hall</i> <i>Moorreesburg Library Hall</i> <i>Abbotsdale Community Hall</i> <i>Chatsworth Library</i> 	1 Feb 1-10 Feb	SPLUMA S 20(3) WCLUPA S13 Bylaw S7(1)(b)

MARCH 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	15 Mar: Executive Mayoral Committee
19	20	21	22	23	24	25	21 Mar: Human Rights Day; 23 Mar: Council
26	27	28	29	30	31		31 Mar: Schools close

Task	Date	Legal Reference
Table draft IDP and budget in Council (<i>at least 90 days before the start of the budget year</i>)		MFMA Section 16:
<ul style="list-style-type: none"> Budget Steering Committee Submit to Mayoral Committee Submit to Council 	9 Mar 15 Mar 23 Mar	<i>(1) The council of a municipality must for each financial year approve an annual budget for the municipality before the start of that financial year.</i> <i>(2) In order for a municipality to comply with subsection (1), the mayor of the municipality must table the annual budget at a council meeting at least 90 days before the start of the budget year.</i>
<ul style="list-style-type: none"> Submit the draft IDP and budget to the Local Government, Provincial Treasury, National Treasury and other affected organs of state Make public the draft IDP and budget and invite the community to submit representations 	24 Mar 28+29 Mar	MFMA Section 22: <i>Immediately after an annual budget is tabled in a municipal council, the accounting officer of the municipality must</i> <i>(a) in accordance with Chapter 4 of the Municipal Systems Act -</i> <i>(i) Make public the annual budget and the documents referred to in Section 17(3); and</i> <i>(ii) invite the local community to submit representations in connection with the budget;</i> <i>(b) submit the annual budget -</i> <i>(i) in both printed and electronic formats to the National Treasury and the relevant provincial treasury; and</i> <i>(ii) in either formats to any prescribed national or provincial organs of state and to other municipalities affected by the budget.</i>
Submit the draft IDP to the District Municipality	24 Mar	MSA Section 29(3)(b): <i>A local municipality must draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the district municipality.</i>

APRIL 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
						1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	10 Apr: Schools open; 12 Apr: Executive Mayoral Committee; 14 Apr: Good Friday
16	17	18	19	20	21	22	17 Apr: Family Day
23	24	25	26	27	28	29	27 Apr: Freedom Day
30							

Task	Date	Legal Reference
Process of consultation and meetings with local community and stakeholders, Provincial and National Treasury and other organs of state	3-21 Apr	<p>MFMA Section 23(1): When the annual budget has been tabled, the municipal council must consider any views of –</p> <p>(a) the local community; and</p> <p>(b) the National Treasury, the relevant provincial treasury and any provincial or national organs of state or municipalities which made submissions on the budget.</p> <p>MSA Section 29(1)(b): The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for-</p> <p>(i) the local community to be consulted on its development needs and priorities;</p> <p>(ii) the local community to participate in the drafting of the integrated development plan; and</p> <p>(iii) organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the integrated development plan.</p>
Consider comments received from Provincial Minister and public on SDF	Apr	<p>WCLUPA S.13 (1)(b) : Consider comments from Provincial Minister</p> <p>Bylaw S.7(10)(d): Consider comments from Provincial Minister</p>
SMAF meeting	Before 21 Apr	

MAY 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	1	2	3	4	5	6	1 May: Workers Day
7	8	9	10	11	12	13	10 May: Executive Mayoral Committee
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	25 May: Council
28	29	30	31				

Task	Date	Legal Reference
Council must give the mayor an opportunity to respond to the submissions and, if necessary, to revise the budget and table amendments for consideration by the council	24 Apr - 11 May	<p>MFMA Section 23(2): After considering all budget submissions, the council must give the mayor an opportunity-</p> <p>(a) to respond to the submissions; and</p> <p>(b) if necessary, to revise the budget and table amendments for consideration by the council.</p>
Completion of Annual Budget amendments / refinements	Before 11 May	

Task	Date	Legal Reference
Table IDP, budget and Revised SDF in Council (at least 30 days before the start of the budget year)		MFMA Section 24(1): The Council must at least 30 days before the start of the budget year consider the approval of the annual budget.
▪ Submit to Budget Steering Committee	11 May	
▪ Submit to Mayoral Committee	17May	
▪ Submit to Council	25 May	
Place the IDP, annual budget, all budget-related documents and all budget-related policies on the website (within 5 days of the adoption of the plan)	Before 30 May	MFMA Section 75(1): The accounting officer of a municipality must place on the website the following documents of the municipality: (a) the annual and adjustments budgets and all budget-related documents; and (b) all budget-related policies MSA Section 21A(1)(b): All documents that must be made public by a municipality in terms of a requirement of this Act, the Municipal Finance Management Act or other applicable legislation, must be conveyed to the local community by displaying the documents on the municipality's official website, if the municipality has a website as envisaged by section 21B. MFMA Section 75(2): A document referred to above must be placed on the website not later than five days after its tabling in the council or on the date on which it must be made public, whichever occurs first.

JUNE 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
				1	2	3	
4	5	6	7	8	9	10	7 June: Executive Mayoral Committee
11	12	13	14	15	16	17	16 Jun: Youth day
18	19	20	21	22	23	24	23 Jun: Schools close
25	26	27	28	29	30		

Task	Date	Legal Reference
Submit a copy of the IDP to the MEC for local government as well as Provincial Treasury (within 10 days of the adoption of the plan)	Before 2 Jun	MSA Section 32(1)(a): The municipal manager of a municipality must submit a copy of the integrated development plan as adopted by the council of the municipality, and any subsequent amendment to the plan, to the MEC for local government in the province within 10 days of the adoption or amendment of the plan.
Submit approved budget to the Provincial Treasury and National Treasury (within 10 working days after approval of the budget)	Before 8 Jun	MFMA Section 24(3): The accounting officer of a municipality must submit the approved annual budget to the National Treasury and the relevant provincial treasury. MBRR Reg 20: The municipal manager must comply with section 24(3) of the Act within ten working days after the municipal council has approved the annual budget.
Give notice to the public of the adoption of the IDP (within 14 days of the adoption of the plan)	6+7 Jun	MSA Section 25(4)(a): A municipality must, within 14 days of the adoption of its integrated development plan in terms of subsection (1) or (3) give notice to the public- (i) of the adoption of the plan; and (ii) that copies of or extracts from the plan are available for public inspection at specified places; MSA Section 21A(1)(a) and (c): All documents that must be made public by a municipality in terms of a requirement of this Act, the MFMA or other applicable legislation, must be conveyed to the local community -

Task	Date	Legal Reference
		<p>(a) by displaying the documents at the municipality's head and satellite offices and libraries;</p> <p>(c) by notifying the local community, in accordance with section 21, of the place, including the website address, where detailed particulars concerning the documents can be obtained.</p>
Give notice of SDF adoption (within 14 days)	6 +7 June	Bylaw S7(3) : Must within 14 days of its decision give notice of its decision in the media and Provincial Gazette
Publicise a summary of the IDP (<i>within 14 days of the adoption of the plan</i>)	6+7 Jun	MSA Section 25(4)(b) : A municipality must, within 14 days of the adoption of its integrated development plan in terms of subsection (1) or (3) publicise a summary of the plan.
Make public the approved annual budget and supporting documentation (including tariffs) (<i>within 10 working days after approval of the budget</i>)	6+7 Jun	<p>MBRR Reg 18:</p> <p>(1) Within ten working days after the municipal council has approved the annual budget of a municipality, the municipal manager must in accordance with section 21A of the Municipal Systems Act make public the approved annual budget and supporting documentation and the resolutions referred to in section 24(2)(c) of the Act.</p> <p>(2) The municipal manager must also make public any other information that the municipal council considers appropriate to facilitate public awareness of the annual budget, including-</p> <p>(a) summaries of the annual budget and supporting documentation in alternate languages predominant in the community; and</p> <p>(b) information relevant to each ward in the municipality.</p> <p>(3) All information contemplated in subregulation (2) must cover:</p> <p>(a) the relevant financial and service delivery implications of the annual budget; and</p> <p>(b) at least the previous year's actual outcome, the current year's forecast outcome, the budget year and the following two years.</p>
Submit to the Executive Mayor the draft SDBIP and draft annual performance agreements for the next year (<i>within 14 days after approval of the budget</i>)	Before 8 Jun	<p>MFMA Section 69(3):</p> <p>(a) The accounting officer must no later than 14 days after the approval of an annual budget submit to the mayor a draft service delivery and budget implementation plan for the budget year.</p> <p>(b) The accounting officer must no later than 14 days after the approval of an annual budget submit to the mayor drafts of the annual performance agreements as required in terms of section 57(1)(b) of the Municipal Systems Act for the municipal manager and all senior managers.</p>
Place the performance agreements and all service delivery agreements on the website	Before 19 Jun	<p>MFMA Section 75(1): The accounting officer of a municipality must place on the website the following documents of the municipality:</p> <p>(d) performance agreements required in terms of section 57(1)(b) of the Municipal Systems Act; and</p> <p>(e) all service delivery agreements</p> <p>MBRR Reg 19: The accounting officer must place on the website all performance agreements required in terms of section 57(1)(b) of the Municipal Systems Act.</p>

Task	Date	Legal Reference
Executive Mayor takes all reasonable steps to ensure that the SDBIP is approved (<i>within 28 days after approval of the budget</i>)	14 June	MFMA Section 53(1)(c)(ii): <i>The mayor of a municipality must take all reasonable steps to ensure that the municipality's service delivery and budget implementation plan is approved by the mayor within 28 days after approval of the budget.</i>

Task	Date	Legal Reference
Submit copies of the performance agreements to the -		<i>MFMA Section 53(3)(b): Copies of such performance agreements must be submitted to the council and the MEC for local government in the province.</i>
▪ Mayoral Committee	12 July	
▪ MEC for local government	Before 28 Jun	
Submit the SDBIP to National and Provincial Treasury (<i>within 10 working days approval of the plan</i>)	Before 28 Jun	<i>MBRR Reg 20(2)(b): The municipal manager must submit to the National Treasury and the relevant provincial treasury, in both printed and electronic form the approved service delivery and budget implementation plan within ten working days after the mayor has approved the plan.</i>
Make public the projections, targets and indicators as set out in the SDBIP (<i>within 10 working days after the approval of the SDBIP</i>)	Before 28 Jun	<i>MFMA Section 53(3)(a): The mayor must ensure that the revenue and expenditure projections for each month and the service delivery targets and performance indicators for each quarter, as set out in the service delivery and budget implementation plan, are made public no later than 14 days after the approval of the service delivery and budget implementation plan.</i> <i>MBRR Reg 19: The municipal manager must in accordance with section 21A of the Municipal Systems Act make public the approved service delivery and budget implementation plan within ten working days after the mayor has approved the plan in terms of section 53(1)(c)(ii) of the Act.</i>
Make public the performance agreements of Municipal Manager and senior managers (<i>no later than 14 days after the approval of the SDBIP</i>)	Before 28 Jun	<i>MFMA Section 53(3)(b): The mayor must ensure that the performance agreements of municipal manager, senior managers and any other categories of officials as may be prescribed, are made public no later than 14 days after the approval of the municipality's service delivery and budget implementation plan.</i>