



Swartland Municipality

PROCESS PLAN

to guide the planning, drafting, adoption and review of the

SWARTLAND INTEGRATED DEVELOPMENT PLAN

including the

MSDF, Annual Budget and performance management

August 2022

IDP Process Plan

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

and includes

a Programme with timeframes for the different steps in terms of Section 29(1) of the Municipal Systems Act 32 of 2000 / Time Schedule in terms of section 21(1)(b) of the Municipal Finance Management Act 56 of 2003

Adopted by the Council on ...

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. Integrated development planning is 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 platform 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.

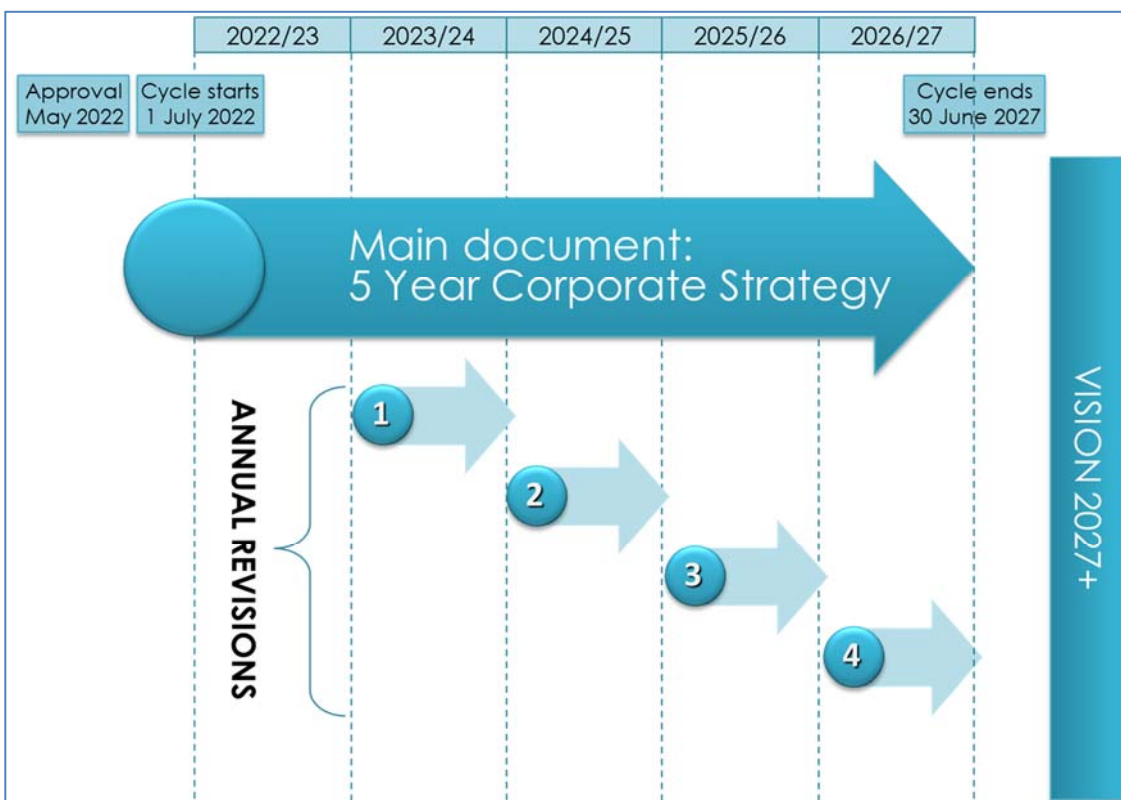
The **Process Plan** fulfils the function of a business plan or an operational framework for the IDP process. It says in a simple and transparent manner what has to happen when, by whom, with whom, and where, and it includes a budget.

1.2 Area of the IDP

The IDP will be applicable to the Swartland Municipal Area which includes the following towns and settlements: Malmesbury, Abbotsdale, 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 compilation / review process

The IDP compilation / review process normally goes through the following phases between September of any year and May of the following year:

Phase	Tasks	Mechanisms
Analysis	<i>Broad awareness and support:</i>	
	<ul style="list-style-type: none"> ▪ Electronic needs survey ▪ Mass communication 	<ul style="list-style-type: none"> ▪ Google Forms ▪ Social media, newsletter, radio interviews notice boards and press articles
	<i>Compilation of area plans:</i>	
	<ul style="list-style-type: none"> ▪ Ward profiles ▪ Services backlogs ▪ Priority issues ▪ Sector needs and issues 	<ul style="list-style-type: none"> ▪ Meetings per area with community representatives ▪ Open days ▪ Ward committee meetings ▪ Inputs by departments
	<i>Focus group discussions:</i>	
	Meetings per focus group with key role-players (Safety, Health, Education, Agriculture, Business, Tourism and Religion)	<ul style="list-style-type: none"> ▪ Meetings ▪ Stakeholders discussions
	<i>Internal analysis and technical input:</i>	
<ul style="list-style-type: none"> ▪ Critical issues / challenges ▪ Minimum service levels 	<ul style="list-style-type: none"> ▪ In-house exercise by departments ▪ Sector plans ▪ Spatial Development Framework Performance assessment 	
<i>Inter-governmental alignment:</i>		
Align with National and Provincial Policies, programmes and projects	<ul style="list-style-type: none"> ▪ Desktop study by Strategic Manager ▪ Swartland Intergovernmental Forum 	
Strategy	Council and Management discuss strategic issues such as vision and mission, future directions as well as strategic goals and objectives.	<ul style="list-style-type: none"> ▪ Strategy workshops ▪ In-house exercise by Management Team
Tabling of draft IDP and draft annual budget	Finalise and table draft IDP, SDF and 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, SDF and draft annual budget for comments and submissions. ▪ Submissions and consultations. 	<ul style="list-style-type: none"> ▪ In-house exercise by Director Financial Services and Strategic Manager ▪ Public meetings & workshops ▪ Mayoral Consultative Forum
Final approval	<ul style="list-style-type: none"> ▪ Council approves the final IDP, SDF and annual budget 	In-house preparation of the relevant documentation and submission to Council

2 LEGAL PROCESS 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 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.*

MUNICIPAL PLANNING AND PERFORMANCE MANAGEMENT REGULATIONS, 2001, REGULATION 3 - PROCESS FOR AMENDING IDP'S

[NOTE: DCoG busy with amendment of the Regulations which will affect Regulation 3]

- (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 IDP 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 IDP 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 IDP 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) [district municipality]; and*

- (d) the municipality, if it is a local municipality, has complied with subregulation (6).
- (5) [district municipality]
- (6) A local municipality that considers an amendment to its IDP must -
- (a) consult the district municipality in whose area it falls on the proposed amendment; and
 - (b) take all comments submitted to it by the district municipality into account before it takes a final decision on the proposed amendment.

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.
- A guideline for the contents of 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 ENGAGEMENT WITH COMMUNITY AND STAKEHOLDERS

4.1 Organisational arrangements

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

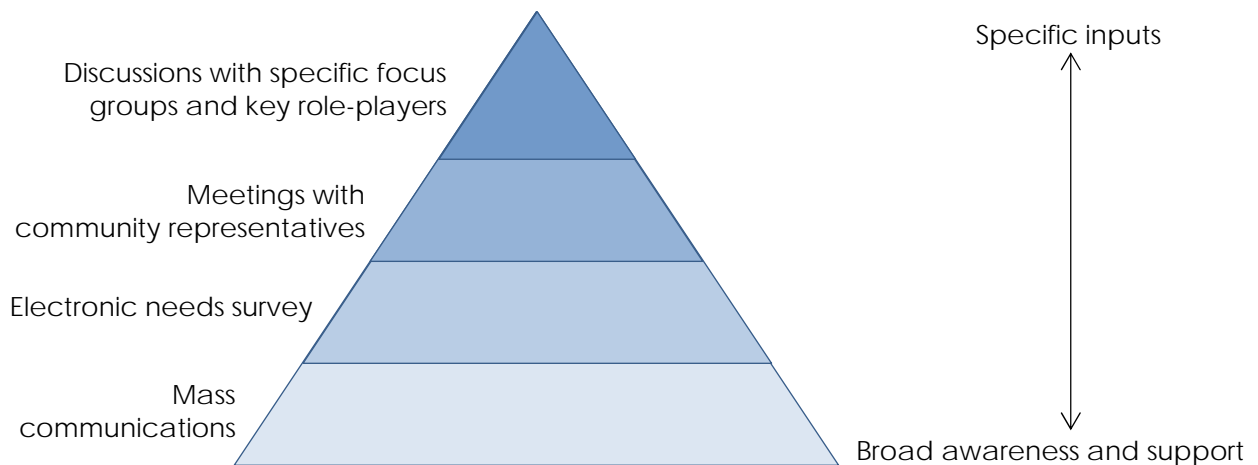
- institutionalise the participation process;
- effectively manage outputs; and
- give affected parties access to contribute to the decision-making process.

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 engagement with the community and stakeholders 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 Ways of engagement

The engagements discussed below will happen during **September to November** of each year. During **April** of the following year the draft IDP will be advertised for written public comments and inputs.

(a) Mass communications

Will be done inter alia by means of the Municipality's Facebook Page, newsletters, WhatsApp, radio interviews, notice boards and press articles.

(b) Electronic needs survey

Will be done by means of the free Google Forms service that is accessible from any device over the internet.

(c) Meetings per area with community representatives

Meetings will be held with community representatives per area. Representatives will include inter alia community leaders, NGO's in the area concerned, sector representatives, representatives of vulnerable groups and SMME's.

(d) Open days

Join SDF open days.

(e) Meetings per focus group with specific key role-players

- **Safety:** CPF's, SAPS, neighbourhood watches, private security firms
- **Health:** Swartland District health representatives, Health Forum, private health practitioners, EMS
- **Education:** Regional representatives of DoE, school principals, West Coast College
- **Agriculture:** Representative of Agricultural Society, Farm Workers Association, emerging farmers
- **Business:** Meetings with business chambers / associations, meeting with large business role-players including mega-farmers.
- **Tourism:** Meetings with representatives of tourism organisations, accommodation establishments, restaurants as well as farms and wineries that are open to tourists.
- **Religion:** Meetings with representatives from the Swartland Interdenominational Forum.
- **Sport:** Meetings with representatives of Sport associations / clubs

4.4 Ward committees

The role of the Ward Committees with respect to public engagement is to -

- Assist the ward councillor in identifying challenges and needs of residents.
- Prioritise of challenges and needs
- Interact with other forums and organisations on matters affecting the ward.
- Draw up a area plan that offers suggestions on how to improve service delivery and address the needs in a particular ward / area.

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

4.5 Swartland Intergovernmental Forum (SIF)

The Integrated Development Planning process requires alignment with other spheres of government at different stages during the process. Before starting with the IDP process the Municipality needs to understand where alignment should take place and through which mechanism this can best be achieved. Alignment is the instrument to determine the role and inputs of the different spheres of government.

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.

Inter-governmental alignment during the process will be achieved through the Swartland Intergovernmental Forum. The Forum will meet during **September to November** of each year and will involve stakeholders from different spheres of government involved in the municipal IDP.

4.6 Mayoral Consultative Forum (MCF)

The Mayoral Consultative Forum (MCF) will meet **during April of each year** to assist in finalising the IDP content. The MCF will comprise of -

- two members from each ward committee;
- at least two representatives from the each of the focus areas mentioned in paragraph 4.3(e) above, namely **Safety, Health, Education, Agriculture, Business, Tourism, Religion and Sport**. The representatives should be nominated at the meetings held during September to November in terms of paragraph 4.3(e); and
- Municipal councillors (ex officio).

The MCF 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.

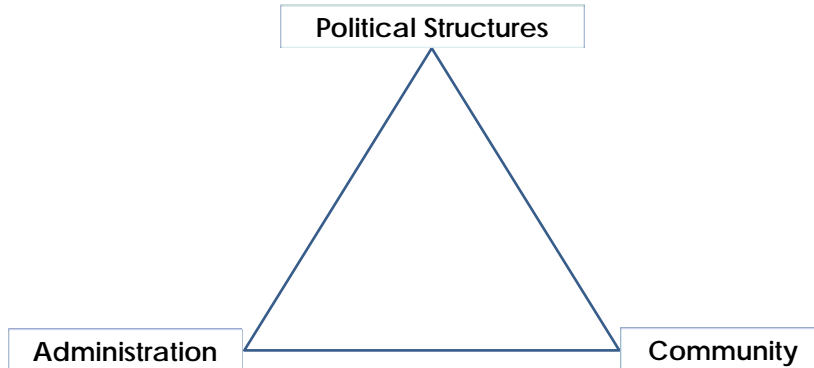
Role Player	Roles and Responsibilities
Provincial Government	<ul style="list-style-type: none"> ▪ Ensure horizontal alignment of the IDP's of the district municipalities within the province. ▪ Ensure vertical/sector alignment between provincial sector departments/ provincial strategic plans and the IDP 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

(a) Legal framework

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 - Functions and powers of executive mayors

- (2) 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.*

(b) Responsibilities of different role players

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 structured 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 ▪ Create awareness around public participation 		
Municipal Manager and Management Team (Responsible)	<ul style="list-style-type: none"> ▪ Actively partake in the engagements with community and stakeholders ▪ Summarise / digest process inputs from the participation process ▪ Discuss / comment on inputs from specialists ▪ Provide technical / sector expertise and information ▪ Provide inputs related to the various planning steps 		
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	
Community and stakeholders	As described in Section 4		

6 IDP CONTENT

6.1 Legal requirements

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:

[NOTE: DCoG busy with amendment of the Regulations which will affect Regulation 2]

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.**

6.2 Guideline for the contents of the IDP

The form and content of an IDP are largely subject to the discretion of a Municipality. The following bullets serve only as a guide:

- Forewords by the Executive Mayor and Municipal Manager
- Introduction and background
- The planning process, roles and responsibilities
- The organisation
- Intergovernmental policy alignment - national, provincial and district
- Sector plan alignment
- Status quo information
- Strategy (vision, mission, goals)
- Expenditure framework - Municipal budget, financial allocations, provincial budget
- Status of sector plans and policy

7 ANNUAL REVISION OF THE IDP

7.1 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.

[NOTE: DCoG is busy with amendment of the 2001 Municipal Planning and Performance Management Regulations. A new regulation 3A is proposed that deals with the Review of an IDP]

7.2 Annual review and amendment explained

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 Section 34 is therefore to -

- compare the actual progress of the implementation of the integrated development plan with the planned progress;
- measure actual performance in terms of the integrated development plan with the appropriate performance targets provided for in the integrated development plan; and
- take into account any changed circumstances, including national, provincial and local priorities, new or updated policies or events that may necessitate the amendment of the integrated development plan.

If at the end of the review process the municipality decides to amend the IDP such amendment must be in accordance with ***MSA Section 34(b)*** and regulation 3 of the ***2001 Municipal Planning and Performance Management Regulations***.

8 LEGAL AND POLICY DOCUMENTS GUIDING THE IDP

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)
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 (2011)
Medium-Term Strategic Framework: 2019 – 2024
National District Development Model (DDM) and One Plan
Integrated Urban Development Framework - 2016

Provincial policy

Western Cape's Provincial Strategic Plan: 2019-2024
Western Cape Joint District and Metro Approach (JDMA)
Western Cape Provincial Spatial Development Framework - March 2014

ANNEXURE A

PROGRAMME WITH TIMEFRAMES IN TERMS OF SECTION 29(1)(a) OF THE MSA / TIME SCHEDULE IN TERMS OF SECTION 21(1)(b) OF THE MFMA

ACRONYMS USED IN THE PROGRAMME

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
MSDF	Municipal Spatial Development Framework
BYLAW	Swartland Municipality : Land Use Planning Bylaw, 2017

WHERE REFERENCE IS MADE IN THE ANNEXURE TO "MAKE PUBLIC", THE FOLLOWING APPLIES:

Municipal Systems Act, Section 21A(1) -

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 -

- (a) by displaying the documents at the municipality's head and satellite offices and libraries;
- (b) by displaying the documents on the municipality's official website, **and**
- (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.

CONSULTATION WITH LOCAL COMMUNITY REGARDING THE PROCESS PLAN (Section 28, MSA)

The municipality will consult the local community during June and July 2022 before the Council adopts the Process Plan on 25 August 2022.

KEY DEADLINES PER MONTH

AUGUST 2022

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

Date	IDP	Budget	SDF	Performance Management	Legal Reference
17 Aug	Submit Process Plan to Mayoral Committee				<p>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.</p>
25 Aug	Submit Process Plan to Council for approval				
29 Aug	Submit Process Plan to Provincial Treasury, Department of Local Government and the West Coast District Municipality and post on Municipal website.				
31 Aug		Submit annual financial statements to the Auditor-General for auditing		Submit annual performance report to the Auditor-General for auditing	<p>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</p> <p>MSA Section 46:</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p>(1) A municipality must prepare for each financial year a performance report reflecting</p> <p>(a) the performance of the municipality and of each external service provider during that financial year;</p> <p>(b) a comparison of the performances referred to in paragraph (a) with targets set for and performances in the previous financial year; and</p> <p>(c) measures taken to improve performance.</p> <p>(2) An annual performance report must form part of the municipality's annual report in terms of Chapter 12 of the Municipal Finance Management Act.</p>

SEPTEMBER 2022

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	19	20	21	22	23	24	21 Sep: Mayoral Committee; 24 Sep: Heritage Day
25	26	27	28	29	30		

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Sep	Public engagements:				<p>MSA Section 29(1)(b): The process followed by a municipality to draft its IDP, 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 IDP; and</p> <p>(iii) organs of state, including traditional authorities, and other role players to be</p>
Sep+Oct	▪ Mass communication				
5-30 Sep	▪ Electronic survey (community needs)				
12-20 Sep	▪ Meetings per area with community rep's				
Sep+Oct	▪ Meetings per focus group				

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<i>identified and consulted on the drafting of the IDP.</i>
Sep			Short evaluation synthesis of SDF (Identify strengths, weaknesses, opportunities constraints) Identify top key strategic issues in SDF		LUPA S.10
1 Sep		Commence with the spreadsheets for multi-year capital and operating budgets (Budget Office)			
1 Sep		Determine revenue projections and proposed rate and service charges and drafts initial allocations for the next financial year after taking into account strategic objectives.			
1 Sep		Engage with Provincial and National sector departments on sector specific programmes for alignment with municipalities plans (schools, libraries, clinics, water, electricity, roads, etc)			
6+7 Sep	Give notice of the approved Process Plan through local media				MSA Section 28(3): A municipality must give notice to the local community of particulars of the process it intends to follow
9 Sep				Annual panel evaluation of the 2019/2020 performance	MPR Regulation 27(4) Evaluation panel: (d) For purposes of evaluating the annual performance of the municipal manager: (i) Executive Mayor or Mayor; (ii) Chairperson of the audit committee; (iii) Member of the mayoral committee; (iv) Mayor and/or municipal manager from another municipality; and

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p>(v) Member of a ward committee as nominated by the Executive Mayor.</p> <p>(e) For purposes of evaluating the annual performance of managers directly accountable to the municipal manager:</p> <ul style="list-style-type: none"> (i) Municipal Manager; (ii) Chairperson of the audit committee; (iii) Member of the mayoral; and (iv) Municipal manager from another municipality.
12 Sep				Submit performance results of the MM to the MEC for local government	<p>MPR Regulation 34(3): The performance assessment results of the municipal manager must be submitted to the MEC responsible for local government in the relevant province as well as the national minister responsible for local government, within 14 days after the conclusion of the assessment</p>
30 Sep		Distribute operating and capital budget spreadsheets to departments for purposes of multi-year request verification			

OCTOBER 2022

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	19	20	21	22	18 Oct: Mayoral Committee
23	24	25	26	27	28	29	27 Oct: Council
30	31						

Date	IDP	Budget	SDF	Performance Management	Legal Reference
3 Oct		Commence with the review of the Long term Financial Plan			<i>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.</i>
3 Oct		Commence with salary, vehicle and operating budget compilation			
3 Oct		Determine potential price increases of bulk resources			
10 Oct		Distribute capital budget spreadsheets to departments			
24 Oct-3 Nov	Public engagements: Sessions with ward committees				
27 Oct				Submit Section 52 Report to Council	<i>MFMA Section 52(d): The mayor must, within 30 days of the end of each quarter, submit a report to the council on the implementation of the budget and the financial state of affairs of the municipality</i>
31 Oct		Deadline for operating budget inputs, including salary budget and vehicle budget			

Date	IDP	Budget	SDF	Performance Management	Legal Reference
31 Oct				Submit Section 52 Report to the National Treasury and the relevant provincial treasury	<i>MBRR Regulation 31(1)(c):</i> The mayor's quarterly report on the implementation of the budget and the financial state of affairs of the municipality must be submitted to the National Treasury and the relevant provincial treasury <i>within five days of tabling of the report in the council.</i>
Oct+Nov			Internal Analysis – <ul style="list-style-type: none"> ▪ critical issues / challenges with respect to every service ▪ minimum service levels ▪ institutional ▪ financial ▪ performance ▪ Surrounding municipalities 		<i>LUPA S.15</i>
Oct+Nov			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>
Oct+Nov			SDF composite synthesis		

NOVEMBER 2022

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	19	<i>16 Nov: Mayoral Committee</i>
20	21	22	23	24	25	26	
27	28	29	30				

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Nov	Commence with the compilation of new area plans				
Nov		Determine possible tariff increases for water and electricity			
2 Nov	Swartland Intergovernmental Forum meeting (SIF)				
4 Nov		Deadline for capital budget inputs from departments			
11 Nov		Due date for final adjustment budget submissions			
21-24 Nov				Review the KPI's and targets for current financial year during the performance assessment meetings	
24+25 Nov	Strategy Workshop (councillors, municipal manager, directors, selected senior managers) to consolidate all strategic inputs and to formulate a vision, mission and goals for the IDP.		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.		

Date	IDP	Budget	SDF	Performance Management	Legal Reference
			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.		

DECEMBER 2022

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 Dec: 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

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Dec+Jan			Prepare 1st Draft of amendment of SDF		SPLUMA S.7 & 21 LUPA S.10 Bylaw S.7
1 Dec		Commence with compilation of Adjustments Budget (B Schedule and Datastring)		Commence with compilation of midyear budget and performance assessments report	

JANUARY 2023

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: Mayoral Committee
22	23	24	25	26	27	28	26 Jan: Council
29	30	31					

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Jan+Feb	Commence with IDP document	<ul style="list-style-type: none"> ▪ Finalise budget in the prescribed formats incorporating National & provincial budget allocations ▪ Integrate and align to IDP documentation and draft SDBIP ▪ Finalise budget policies 		Finalise KPI's and annual performance targets	
18 Jan				Submit review of KPI's and performance targets for current financial year to Mayoral Committee	
18 Jan			Submit first draft of the amendment SDF to the Mayoral Committee		<p>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></p> <p>WCLUPA S13(1) <i>The municipality must submit a draft amendment of a spatial development framework to the provincial Minister for written comment.</i></p> <p>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></p> <p><i>Bylaw S.7(1)(b)</i></p>
26 Jan			Submit first draft of the amendment SDF to the Council		

Date	IDP	Budget	SDF	Performance Management	Legal Reference
18 Jan				Submit Annual Report to Mayoral Committee	MFMA Section 127(2): The mayor of a municipality must, within seven months after the end of a financial year , table in the municipal council the annual report of the municipality.
26 Jan				Table Annual Report in Council	
18 Jan				Submit Section 72 mid-year assessment report to Mayoral Committee	MFMA Section 72(1): The accounting officer of a municipality must by 25 January of each year-
25 Jan				Submit Section 72 mid-year assessment report to Provincial Treasury and National Treasury	(a) assess the performance of the municipality during the first half of the financial year; and (b) submit a report on such assessment to-
26 Jan				Submit Section 72 mid-year assessment report to Council	(i) the mayor of the municipality; (ii) the National Treasury; and (iii) the relevant provincial treasury MFMA Section 54(1)(f): The mayor must, in the case of a section 72 report, submit the report to the council by 31 January of each year. MBRR Regulation 35(1): The municipal manager must submit to the National Treasury and the relevant provincial treasury, in both printed and electronic form (a) the mid-year budget and performance assessment by 25 January of each year; and (b) any other information relating to the mid-year budget and performance assessment as may be required by the National Treasury.
12 Jan		Submit Adjustments Budget to Budget Steering Committee			MFMA Section 28(1): A municipality may revise an approved annual budget through an adjustments budget.
18 Jan		Submit Adjustments Budget to Mayoral Committee			MBRR Regulation 23(1): An adjustments budget may be tabled in the municipal council at any time after the mid-year budget and performance assessment has been tabled in the council, but not later than 28 February of the current year.
26 Jan		Submit Adjustments Budget to Council			

Date	IDP	Budget	SDF	Performance Management	Legal Reference
26 Jan				Submit Section 52 Report to Council	MFMA Section 52(d): The mayor must, within 30 days of the end of each quarter , submit a report to the council on the implementation of the budget and the financial state of affairs of the municipality
30 Jan				Make the Section 72 mid-year assessment report public by placing it on the municipal website.	MBRR Regulation 34(1): Within five working days of 25 January each year the municipal manager must make the midyear budget and performance assessment public by placing it on the municipal website.
31 Jan				Submit Section 52 Report to the National Treasury and the relevant provincial treasury	MBRR Regulation 31(1)(c): The mayor's quarterly report on the implementation of the budget and the financial state of affairs of the municipality must be submitted to the National Treasury and the relevant provincial treasury within five days of tabling of the report in the council.

FEBRUARY 2023

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 Feb: Mayoral Committee
19	20	21	22	23	24	25	
26	27	28					

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Feb		Note any provincial and national allocations to municipalities (DORA and Prov Gazette) for incorporation into budget			
Feb		Finalise detailed operating and capital budgets in the prescribed formats incorporating National and Provincial budget allocations, integrate and			

Date	IDP	Budget	SDF	Performance Management	Legal Reference
		align to IDP documentation and draft SDBIP, finalise budget policies including tariff policy			
Feb+Mar	Finalise IDP document and area plans	Finalise the draft capital and operating budget and budget related policies			
Feb+Mar				Annual review of KPI's and performance targets for next financial year	<p>MPPMR Regulation 11: (1) A municipality must review its KPI's annually as part of the performance review process referred to in regulation 13. (2) Whenever a municipality amends its IDP in terms of section 34 of the Act, the municipality must review those KPI's that will be affected by such amendment.</p> <p>MPPMR Regulation 12: (1) A municipality must, for each financial year, set performance targets for each of the KPI's set by it.</p>
Feb+Mar				Compile draft SDBIP for next financial year	
Feb+Mar				Make revisions to the SDBIP for the current financial year following approval of an adjustments budget	<p>MFMA Section 54(1)(c): On receipt of a statement or report submitted in terms of section 71 or 72, the mayor must consider and, if necessary, make any revisions to the SDBIP, provided that revisions to the service delivery targets and performance indicators in the plan may only be made with the approval of the council following approval of an adjustments budget</p>
Feb+Mar		Finalise review the Long term Financial Plan			<p>MSA Section 26(h): An IDP must reflect a financial plan, which must include a budget projection for at least the next three years</p>
1 Feb			Submit draft amendment of the Spatial Development Framework to Provincial Minister for written comments		<p>WCLUPA S.13(1)(a) S.7(1)(c)</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
1 Feb			Invite the public to submit written representation on amendment of SDF		SPLUMA S 20(3) WCLUPA S13 Bylaw S7(1)(b)
30 Jan - 10 Feb		Open days to be held - <ul style="list-style-type: none"> ▪ Yzerfontein Community Hall ▪ Darling Community Hall ▪ Wesbank Community Hall ▪ Riebeek West Town Hall ▪ Moorreesburg Library Hall ▪ Abbotsdale Community Hall ▪ Chatsworth Library 			
1 Feb				Submit the annual report to the Auditor-General, Provincial Treasury and provincial department responsible for local government	MFMA Section 127(5): Immediately after an annual report is tabled in the council in terms of subsection (2), the accounting officer of the municipality must - (a) in accordance with section 21A of the Municipal Systems Act -
7+8 Feb				<ul style="list-style-type: none"> ▪ Make public the annual report and invite comments from the local community 	<ul style="list-style-type: none"> (i) make public the annual report; and (ii) invite the local community to submit representations in connection with the annual report. (b) submit the annual report to the Auditor-General, the relevant provincial treasury and the provincial department responsible for local government in the province.
1 Feb		Post Adjustments Budget on the website		Post Annual Report on the website	MFMA Section 75(1): The accounting officer of a municipality must place on the website referred to in section 21A of the Municipal Systems Act the following documents of the municipality: (a) The annual and adjustments budgets and all budget related documents, (b) all budget related policies and (c) the annual report
7+8 Feb		Make public the Adjustments Budget			MBRR Regulation 26(1): Within 10 working days after the municipal council has approved an adjustments budget , the municipal manager must make public the approved adjustments budget and supporting documentation, as well as the resolutions referred to in regulation 25(3).

Date	IDP	Budget	SDF	Performance Management	Legal Reference
7+8 Feb				Make public any other information that the municipal council considers appropriate to facilitate public awareness of the midyear budget and performance assessment.	MBRR Regulation 34(2):: The municipal manager must make public any other information that the municipal council considers appropriate to facilitate public awareness of the midyear budget and performance assessment, including - (a) summaries in alternate languages predominant in the community; and (b) info relevant to each ward in the municipality.
Before 9 Feb		Submit the approved adjustments budget to Provincial Treasury and National Treasury			MBRR Regulation 24(1): The municipal manager must comply with section 28(7) of the Act within 10 working days after the mayor has tabled an adjustments budget in the municipal council MFMA Section 28(7): Sections 22(b), 23(3) and 24(3) apply in respect of an adjustments budget, and in such application a reference in those sections to an annual budget must be read as a reference to an adjustments budget.
15 Feb				Submit revised SDBIP for the current financial year to the Mayoral Committee (following approval of an adjustments budget)	MFMA Section 54(1)(c): On receipt of a statement or report submitted in terms of section 71 or 72, the mayor must consider and, if necessary, make any revisions to the SDBIP, provided that revisions to the service delivery targets and performance indicators in the plan may only be made with the approval of the council following approval of an adjustments budget.
21+22 Feb				Make public any revisions of the SDBIP	(3) The mayor must ensure that any revisions of the SDBIP are made public promptly .
20 Feb				Post revised SDBIP on the municipal website	
20 Feb				Submit revised SDBIP to Provincial Treasury and National Treasury	MBRR Regulation 27(2)(b): The municipal manager must submit to the National Treasury and the relevant provincial treasury, in both printed and electronic form the amended SDBIP, within ten working days after the council has approved the amended plan in terms of section 54(1)(c) of the Act;

Date	IDP	Budget	SDF	Performance Management	Legal Reference
24 Feb		Receive notification of any transfers that will be made to the municipality from other municipalities in each of the next three fin years			MFMA Section 37(2): The accounting officer of a municipality responsible for the transfer of any allocation to another municipality must, by no later than 120 days before the start of its budget year , notify the receiving municipality of the projected amount of any allocation proposed to be transferred to that municipality during each of the next 3 fin years.
24 Feb		Preliminary approval of electricity tariff increase for submission to NERSA			

MARCH 2023

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	
19	20	21	22	23	24	25	21 Mar: Human Rights Day; 22 Mar: Mayoral Committee
26	27	28	29	30	31		30 Mar: Council

Date	IDP	Budget	SDF	Performance Management	Legal Reference
7 Mar				MPAC Meeting – Oversight Report	
14 Mar		Submit draft budget to Budget Steering Committee			
22 Mar	Submit draft IDP and area plans to Mayoral Committee	Submit draft budget to Mayoral Committee		Submit review of KPI's and targets to Mayoral Committee	MFMA Section 16: (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 .
30 Mar	Table draft IDP and area plans in Council	Table draft budget in Council		Table review of KPI's and targets in Council	(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 .

Date	IDP	Budget	SDF	Performance Management	Legal Reference
22 Mar				Submit draft SDBIP for next financial year to Mayoral Committee	<p>MBRR Regulation 14: (2) When complying with section 68 of the MFMA, the municipal manager must submit the draft municipal SDBIP to the mayor together with the annual budget to be considered by the mayor for tabling in terms of section 16(2) of the MFMA. (3) For effective planning and implementation of the annual budget, the draft municipal SDBIP may form part of the budget documentation and be tabled in the municipal council if so recommended by the Budget Steering Committee.</p>
30 Mar				Table draft SDBIP for next financial year in Council	
30 Mar				Consider and approve, reject or refer back the Annual Report at a council meeting	<p>MFMA Section 121(1): The council of a municipality must within nine months after the end of a financial year deal with the annual report of the municipality and of any municipal entity under the municipality's sole or shared control in accordance with section 129</p> <p>MFMA Section 129(1): The council of a municipality must consider the annual report of the municipality and of any municipal entity under the municipality's sole or shared control, and by no later than two months from the date on which the annual report was tabled in the council in terms of section 127, adopt an oversight report containing the council's comments on the annual report.</p>
30 Mar				Adopt an Oversight Report providing comments on the annual report	

APRIL 2023

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

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Apr			Consider comments received from Provincial Minister and public on SDF		WCLUPA S.13 (1)(b): <i>Consider comments from Provincial Minister</i> Bylaw S.7(10)(d): <i>Consider comments from Provincial Minister</i>
Apr	IDP/Budget Assessment (SIME / LGMTEC)				
3 Apr	Post on the website the draft IDP and area plans:	Post on the website the budget documents		Post on the website the - <ul style="list-style-type: none"> • Annual Report and Oversight Report; • draft KPI's and targets for next fin year; and • draft SDBIP for next fin year 	MSA Section 21A(1)(b): <i>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 by displaying the documents on the municipality's official website, if the municipality has a website as envisaged by section 21B.</i>
3 Apr	Submit the draft IDP to Local Government, Provincial and National Treasury and other affected organs of state			Submit the draft budget and draft SDBIP to Provincial and National Treasury and other affected organs of state	MFMA Section 22: Immediately after an annual budget is tabled in a municipal council, the accounting officer of the municipality must (b) submit the annual budget - (i) in both printed and electronic formats to the National Treasury and the relevant provincial treasury; and (ii) in either formats to any prescribed national or provincial organs of state and to other municipalities affected by the budget. MBRR Regulation 15(3): <i>When submitting the annual budget to the National Treasury and the relevant provincial treasury the</i>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p><i>municipal manager must also submit, in both printed and electronic form -</i></p> <ul style="list-style-type: none"> <i>(a) the supporting documentation as tabled in the municipal council;</i> <i>(b) the draft SDBIP; and</i> <i>(c) any other information as may be required by the National Treasury</i> <p>MBRR Regulation 15(4): <i>The municipal manager must send copies of the annual budget and supporting documentation, in both printed and electronic form, to any other municipality affected by the annual budget within 10 working days of the annual budget being tabled in the municipal council.</i></p>
3 Apr	Submit the draft IDP to the District Municipality				<p>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></p> <p>MPPMR Regulation 3(6): <i>A local municipality that considers an amendment to its integrated development plan must-</i></p> <ul style="list-style-type: none"> <i>(a) consult the district municipality in whose area it falls on the proposed amendment;</i> <i>and</i> <i>(b) take all comments submitted to it by the district municipality into account before it takes a final decision on the proposed amendment</i>
4+5 Apr	Make public the draft IDP and annual budget and invite the community to submit representations			Make public the review of KPI's and performance targets and invite the community to submit representations	<p>MSA Section 42: <i>A municipality, through appropriate mechanisms, processes and procedures established in terms of Chapter 4, must allow the community to participate in the setting of appropriate key performance indicators and performance targets for the municipality.</i></p> <p>MFMA Section 22(a): <i>Immediately after an annual budget is tabled</i> in a municipal council, the accounting officer of the</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p>municipality must in accordance with Chapter 4 of the Municipal Systems Act -</p> <p>(i) Make public the annual budget and the documents referred to in Section 17(3); and</p> <p>(ii) invite the local community to submit representations in connection with the budget;</p> <p>MBRR Regulation 15(1): When making public the annual budget and supporting documentation the municipal manager must also make public any other information that the municipal council considers appropriate to facilitate the budget consultation process</p> <p>MPPMR Regulation 15(3): A municipality must afford the local community at least 21 days to comment on the final draft of its IDP before the plan is submitted to the council for adoption.</p>
4+5 Apr				Make public the oversight report	<p>MFMA Section 129(3): The accounting officer must in accordance with section 21A of the Municipal Systems Act make public an oversight report referred to in subsection (1) within seven days of its adoption.</p>
6 Apr				Annual Report: Submit copies of the minutes of those meetings to the Auditor General, the relevant provincial treasury and the provincial department for local government	<p>MFMA Section 129(2)(b): The accounting officer must submit copies of the minutes of those meetings to the Auditor General, the relevant provincial treasury and the provincial department responsible for local government in the province.</p>
6 Apr				Submit copies of the annual report and oversight report(s) to the provincial legislator	<p>MFMA Section 132:</p> <p>(1) The following documents must be submitted to the provincial legislature:</p> <p>(a) The annual report ; and</p> <p>(b) all oversight reports on those annual reports adopted in terms of section 129(1).</p> <p>(2) The accounting officer of a municipality must submit the documents referred to in</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					subsection (1) (a) and (b) to the provincial legislature within seven days after the municipal council has adopted the relevant oversight report in terms of section 129(1).
5-28 Apr	Period for public comments and inputs on the IDP and budget and final consultations with ward committees				<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>
26 Apr				Submit Section 52 Report to Council	MFMA Section 52(d): The mayor must, within 30 days of the end of each quarter , submit a report to the council on the implementation of the budget and the financial state of affairs of the municipality
Before 28 Apr	Mayoral Consultative Forum meeting				

MAY 2023

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

Date	IDP	Budget	SDF	Performance Management	Legal Reference
1 May				Submit Section 52 Report to the National Treasury and the relevant provincial treasury	MBRR Regulation 31(1)(c): The mayor's quarterly report on the implementation of the budget and the financial state of affairs of the municipality must be submitted to the National Treasury and the relevant provincial treasury within five days of tabling of the report in the council.
2-12 May	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				MFMA Section 23(2): After considering all budget submissions, the council must give the mayor an opportunity- (a) to respond to the submissions; and (b) if necessary, to revise the budget and table amendments for consideration by the council.
11 May		Submit budget to Budget Steering Committee			
17 May		Submit to Mayoral Committee the - <ul style="list-style-type: none"> • IDP and area plans; • Budget; • Revised SDF; and • Review of KPI's and performance targets. 			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. MBRR Regulation 16(1): At least 30 days before the start of the budget year the mayor must table the following documents in the municipal council - (a) a report summarising the local community's views on the annual budget; (b) any comments on the annual budget received from the National Treasury and the relevant provincial treasury;
25 May		Submit to Council the - <ul style="list-style-type: none"> • IDP and area plans; • Budget; and • Revised SDF 			

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p>(c) any comments on the annual budget received from any other organ of state, including any affected municipality; and</p> <p>(d) any comments on the annual budget received from any other stakeholders</p> <p>MPPMR regulation:</p> <p>(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.</p> <p>(2) Any proposal for amending a municipality's IDP must be-</p> <p>(a) accompanied by a memorandum setting out the reasons for the proposal; and</p> <p>(b) aligned with the framework adopted in terms of section 27 of the Act.</p>
29 May	Place the IDP, annual budget, all budget-related documents and all budget-related policies on the website (<i>within 5 days of the adoption of the plan</i>)				<p>MFMA Section 75(1): The accounting officer of a municipality must place on the website the following documents of the municipality:</p> <p>(a) the annual and adjustments budgets and all budget-related documents; and</p> <p>(b) all budget-related policies</p> <p>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.</p> <p>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.</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
29 May				Make known reviewed KPI's and performance targets by placing it on the municipal website	MSA Section 44: A municipality, in a manner determined by its council, must make known, both internally and to the general public, the key performance indicators and performance targets set by it for purposes of its performance management system.

JUNE 2023

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 June: Mayoral Committee; 16 Jun: Youth day
18	19	20	21	22	23	24	
25	26	27	28	29	30		

Date	IDP	Budget	SDF	Performance Management	Legal Reference
Before 2 Jun	Submit a copy of the IDP to the MEC for local government as well as Provincial Treasury				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. (b) The copy of the IDP to be submitted in terms of paragraph (a) must be accompanied by - (i) a summary of the process referred to in section 29(1); (ii) a statement that the process has been complied with, together with any explanations that may be necessary to amplify the statement

Date	IDP	Budget	SDF	Performance Management	Legal Reference
6+7 Jun	Give notice to the public of the adoption of the IDP and publicise a summary of the plan				<p>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)-</p> <p>(a) give notice to the public-</p> <p>(i) of the adoption of the plan; and</p> <p>(ii) that copies of or extracts from the plan are available for public inspection at specified places;</p> <p>(b) publicise a summary of the plan.</p> <p>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 -</p> <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>
6+7 Jun			Give notice of SDF adoption		<p>Bylaw S7(3) : Must within 14 days of its decision give notice of its decision in the media and Provincial Gazette</p>
6+7 Jun		Make public the approved annual budget and supporting documentation (including tariffs)			<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</p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<p><i>facilitate public awareness of the annual budget, including-</i></p> <ul style="list-style-type: none"> <i>(a) summaries of the annual budget and supporting documentation in alternate languages predominant in the community; and</i> <i>(b) information relevant to each ward in the municipality.</i> <p><i>(3) All information contemplated in subregulation (2) must cover:</i></p> <ul style="list-style-type: none"> <i>(a) the relevant financial and service delivery implications of the annual budget; and</i> <i>(b) at least the previous year's actual outcome, the current year's forecast outcome, the budget year and the following two years.</i>
Before 8 Jun				Submit to the Executive Mayor the draft SDBIP and draft annual performance agreements for the next year	<p>MFMA Section 69(3):</p> <ul style="list-style-type: none"> <i>(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.</i> <i>(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.</i>
Before 8 Jun	Submit approved IDP to the Provincial Treasury and National Treasury	Submit approved budget to the Provincial Treasury and National Treasury			<p>MFMA Section 24(3): <i>The accounting officer of a municipality must submit the approved annual budget to the National Treasury and the relevant provincial treasury.</i></p> <p>MBRR Reg 20: <i>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.</i></p>

Date	IDP	Budget	SDF	Performance Management	Legal Reference
14 Jun				Executive Mayor takes all reasonable steps to ensure that the SDBIP is approved	MFMA Section 53(1)(c)(ii): 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
Before 19 Jun				Place the performance agreements and all service delivery agreements on the website	MFMA Section 75(1): The accounting officer of a municipality must place on the website the following documents of the municipality: (d) performance agreements required in terms of section 57(1)(b) of the Municipal Systems Act; and (e) all service delivery agreements 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.
19 Jun				Submit copies of the performance agreements to the MEC for local government	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
26 Jun				Submit the SDBIP to National and Provincial Treasury	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.
27+28 Jun				Make public the projections, targets and indicators as set out in the SDBIP as well as the performance agreements of Municipal Manager and senior managers	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 SDBIP, are made public no later than 14 days after the approval of the SDBIP. (b) The mayor must ensure that the performance agreements of municipal manager, senior managers and any other categories of officials as may be prescribed,

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					are made public no later than 14 days after the approval of the municipality's SDBIP. 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.
Before 23 Jun		Publish property rates tariffs in Provincial Gazette			PROPERTY RATES ACT Section 14(2): A resolution levying rates in a municipality must be promulgated by publishing the resolution in the Provincial Gazette

JULY 2023

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

Date	IDP	Budget	SDF	Performance Management	Legal Reference
27 Jul				Submit copies of the performance agreements to Council	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
27 Jul				Submit Section 52 Report to Council	MFMA Section 52(d): The mayor must, within 30 days of the end of each quarter , submit a report to the council on the implementation of the budget and the financial state of affairs of the municipality
31 Jul				Submit Section 52 Report to the National Treasury and the relevant provincial treasury	MBRR Regulation 31(1)(c): The mayor's quarterly report on the implementation of the budget and the financial state of affairs of the municipality must be submitted to the National Treasury and the relevant

Date	IDP	Budget	SDF	Performance Management	Legal Reference
					<i>provincial treasury within five days of tabling of the report in the council.</i>