

SUBMISSION OF THE 2024/2025 THE BUDGET AND IDP PROCESS PLAN/TIME-SCHEDULE INCLUDING PMS AND SDF (5/1/1) (DIRECTOR STRATEGY AND SOCIAL DEVELOPMENT)

Purpose of the report

To submit the 2024/ 2025 **Budget and IDP process plan** and time-schedule to Council for consideration.

Legal Framework

Relevant documentation **is attached to this report**

Section 21 of the Local Government: Municipal Finance Management Act, 2003 (Act No. 56 of 2003) stipulates as follows:

21. Budget preparation process

(1) The mayor of a municipality must—

- (a) co-ordinate the processes for preparing the annual budget and for reviewing the municipality's integrated development plan and budget-related policies to ensure that the tabled budget and any revisions of the integrated development plan and budget-related policies are mutually consistent and credible;
- (b) at least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for—
 - (i) the preparation, tabling and approval of the annual budget;
 - (ii) the annual review of—
 - (aa) the integrated development plan in terms of section 34 of the Municipal Systems Act; and
 - (bb) the budget-related policies;
 - (iii) the tabling and adoption of any amendments to the integrated development plan and the budget-related policies; and
 - (iv) any consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).

Section 28 of the Local government: Municipal Systems Act, 2000 (Act No. 32 of 2000) stipulates as follows:

28. Adoption of process

- (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 of the Local government: Municipal Systems Act, 2000 (Act No. 32 of 2000) stipulates as follows:

29. Process to be followed

- (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 time-frames 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.

Section 34 of the Local government: Municipal Systems Act, 2000 (Act No. 32 of 2000) stipulates as follows:

34. Annual review and amendment of integrated development plan — a municipal council—

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

Section 27 of the Local government: Municipal Systems Act, 2000 (Act No. 32 of 2000) stipulates as follows:

27. Framework for integrated development planning

- (1) Each district municipality, within a prescribed period after the start of its 40 elected term and after following a consultative process with the local municipalities within its area, must adopt a framework for integrated development planning in the area as a whole.
- (2) A framework referred to in subsection (1) binds both the district municipality and the local municipalities in the area of the district municipality, and must at least—
 - (a) identify the plans and planning requirements binding in terms of national and provincial legislation on the district municipality and the local municipalities or on any specific municipality;
 - (b) identify the matters to be included in the integrated development plans of the district municipality and the local municipalities that require alignment;
 - (c) specify the principles to be applied and co-ordinate the approach to be adopted in respect of those matters;
 - (d) and determine procedures—
 - (i) for consultation between the district municipality and the local municipalities during the process of drafting their respective integrated development plans; and
 - (ii) to effect essential amendments to the framework

Recommendation

That the 2024/2025 Budget and IDP Process plan and Time schedule be approved.

This item served before an Ordinary Meeting of Council on 31 August 2023

Hierdie item het gedien voor 'n Gewone Vergadering van die Raad op 31 Augustus 2023

Eenparig Besluit / Unanimously Resolved

That the 2024/2025 Budget and IDP Process plan and Time schedule be approved.

(A4600)



PROCESS PLAN AND TIME SCHEDULE OF IDP AND BUDGET INCLUDING THE PMS AND SDF

**1 July 2024 – 30 June 2025
(In preparation for the IDP amendment 2022/23 – 2026/27)**

IDP & BUDGET PROCESS PLAN

INTRODUCTION & BACKGROUND

1.1. INTRODUCTION

The Integrated Development Plan (IDP), as the key tool for the Municipality to tackle its developmental role, represents a continuous cycle of development, planning, implementation and review. Implementation started after the adoption of the 5st - Generation IDP in July 2023. Currently the municipality operates in the 5th - Generation IDP. The IDP is the strategic plan with a cycle period of five years. During its five-year life cycle the IDP is reviewed and updated annually.

The Annual Budget, in turn, provides the Medium Term Revenue & Expenditure Framework (MTREF) which sets out the financial path for the ensuing three years.

These two documents, i.e. the IDP and the Budget – along with the Performance Management System (PMS) – provide a means to assess the progress and achievements with regard to the strategic objectives of the Municipality, thus informing its financial and institutional planning.

With the input of the Provincial authority, local municipalities are continuously in the process of reviewing, improving and updating its IDP, as well as ensuring alignment with the MTREF.

This IDP and Budget Process Plan seek to address, *inter alia*, the:

- Identification of areas requiring additional attention in terms of legislative requirements, proper planning processes and sound financial management;
- Inclusion of the most current Census and own statistical data;
- Consideration and review of any other relevant and new information;
- Addressing comments received from the various role-players;
- Shortcomings and weaknesses identified through self-assessment;
- Preparation and review of sector plans and its alignment with the IDP;
- Preparation and review of the Performance Management System (PMS);
- Updating of the 5-year Financial Plan; and
- Preparation and finalization of the annual Budget in terms of the relevant legislation.

1.2. LEGISLATIVE FRAMEWORK

1.2.1. PROCESS PLAN

In order to ensure minimum quality standards of the IDP and Budget process – and a proper coordination between and within spheres of government – the preparation of the IDP and Budget Process Plan has been regulated by both the Municipal Systems Act and the MFMA.

In terms of Section 28 of the MSA, Council must adopt an IDP and Budget Process Plan. And Section 29 of the MSA specifies that such a Process Plan must include:

- Programs that set out timeframes for the different planning steps;
- Appropriate mechanisms, processes and procedures for consultation with:
 - Local communities, both in terms of needs and priorities as well as consultation during development;

- Organs of state, traditional authorities, and other role-players in the drafting process; and
- Binding plans and planning requirements, i.e. policy and legislation.

In terms of Section 21 of the MFMA, the Executive Mayor must co-ordinate the process for the adoption of the annual Budget and the review of the IDP and related policies so that he/she can ensure mutual consistency and credibility.

The second part of the afore-mentioned Section of the MFMA stipulates that a Process Plan with timeframes must be tabled to Council for consideration at least 10 months prior to implementation of the annual Budget. National Treasury has provided further guidance by the issuing of MFMA Circular 10. That circular provides specific guidance with regard to six distinct steps in compilation of the IDP and Budget.

The table below highlights the six steps, with a concise description of each step:

Steps		Process
1	Planning	Schedule key dates, establish consultation forums, review previous processes
2	Strategizing	Review the IDP, set service delivery objectives for next 3 years, consult on tariffs, indigents, credit control, free basic services etc., and consider local-, provincial- and national issues, the previous year's performance and current economic and demographic trends etc.
3	Preparing	Prepare the Budget, revenue and expenditure projections; draft Budget policies; consult and consider local-, provincial- and national priorities
4	Tabling	Table the draft IDP, the draft Budget and Budget-related policies before council; consult and consider local-, provincial- and national inputs or responses
5	Approving	Council approves the IDP, the Budget and related policies
6	Finalizing	Publish the IDP, Budget and approve the SDBIP and performance targets

Local municipalities are required by the Municipal System Act (Act 32 of 2000) to consult and report back to communities on their planned activities as well as their performances so that communities can be afforded an opportunity to voice their opinions on the day-to-day functioning of the Municipality.

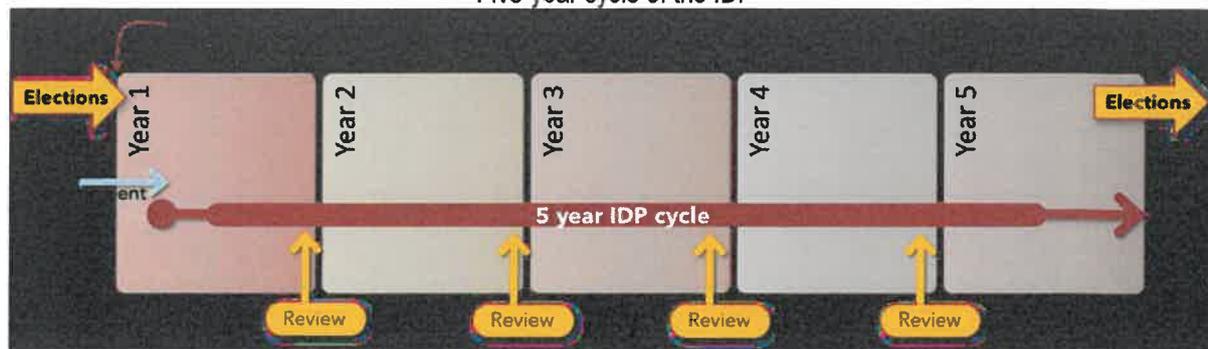
Development of an IDP Framework Plan

In terms of Section 27 of the MSA, the District Municipality must develop a Framework Plan which provides the linkage and binding relationships between the district and local municipalities in its jurisdiction area. In doing so, proper consultation, coordination and alignment of the IDP review process of the district municipality and various local municipalities can be maintained.

2. AREA OF THE IDP

The IDP will be applicable to the Langeberg Municipal Area which includes the following towns: Robertson, Ashton, Bonnievale, Montagu and McGregor.

Five year cycle of the IDP



3. PHASES OF THE ANNUAL PROCESS

PHASE 1 - PLANNING

The Process Plan is divided into activities, and for each activity a timeframe is allocated as well as a linkage to the responsible person for each activity.

The Process Plan is compiled via a process of consultation with all the role-players.

PHASE 2 – ANALYSIS AND STRATEGY

Phase 2 comprises two stages, namely the Analysis and the Strategy formulation stages. For successful forward planning it is imperative to understand precisely what the current situation is as well as the historical trends. Therefore, both external and internal influences must be taken into account. And since all strategies and interventions are to be ward-based, all analyses, as far as possible, should speak to wards.

A proper analysis includes consultation with the whole spectrum of stakeholders, including the general public, as well as a thorough institutional assessment. It is important that all the stakeholders must have a common understanding of the gaps as well as the available resources – i.e. human, financial, property, plant and equipment.

Once the current resources and needs assessment has been completed, then only the formulation of a credible strategy to cover those gaps is possible.

External analysis:

Spatial
Social
Economic
Environmental
Sector needs and issues

Compilation of area plans:

- Ward profiles
- Services backlogs
- Priority Issues

Internal Analysis:

- Critical Issues / challenges
- Minimum service level

Inter-governmental alignment:

Align with National and Provincial Policies

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.

PHASE 3 – PREPARATION AND TABLING

- Preparation of draft Capital program (Next 3 years)
- Preparation of draft Operational Budget (Next 3 years)
- Preparation of draft Adjustment Budget, if necessary, and the
- Finalising and approve draft IDP

PHASE 4 – CONSULTATION AND INTEGRATION

- 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 District Municipality on the draft IDP
- Consult the local community and other stakeholders

PHASE 5 – APPROVAL

Once the IDP and Budget documents are tabled, Council considers it for approval. Approval must take place before the start of the new financial year.

PHASE 6 – FINALIZATION

Once the IDP and Budget have been approved, the final documents are published. The Service Delivery and Budget Implementation Plan (SDBIP) is then developed. The performance agreements are also drafted, based on the approved documents.

4. 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

5. INVOLVEMENT OF THE COMMUNITY AND STAKEHOLDERS

5.1 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

5.2 Structured participation

- Inputs with key role-players e.g. business sector, social sector
- Inputs from ward committees
- Inputs from sector representatives and community members
- Perception and opinion surveys (e.g. Questionnaires & Survey Monkey)
- Mass communication e.g. press articles, Facebook, newsletters

5.3 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

6. ROLES AND RESPONSIBILITIES

6.1 Activities and outputs

It is one of the pre-requisitions 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

6.2 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. <p>Undertake the overall management and co-ordination of the IDP process which includes ensuring that :</p> <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. <ul style="list-style-type: none"> ● 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	<p>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).</p> <ul style="list-style-type: none"> ● Fulfill 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 alignment¹ 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

6.3 Roles and responsibilities - Municipality and stakeholders

Objectives

- 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

Role Players:

I. **Mayoral Committee**

- 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)

II. **Councillors and ward committee members**

- Link integrated development planning process to their respective wards
- Organise public participation

III. **Municipal Manager and Management Team**

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

IV. **Strategic Partners**

- Public sector organisations
- Key business people
- Business and agricultural societies
- NGO's and NPO's
- Sector representatives

V. **Citizens**

- Represent interests and contributing knowledge and ideas

7. 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 coordinated by the Cape Winelands Municipality. Alignment meetings take place on district level, but with the involvement of all local municipalities

8. IDP CONTENT

8.1 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.

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.

8.2 AMENDMENT OF THE IDP

- (1) Only a member or committee of a municipal council may introduce a proposal for amending the municipality's integrated development plan in the council.
- (2) Any proposal for amending a municipality's integrated development plan must be-
 - (a) accompanied by a memorandum setting out the reasons for the proposal; and
 - (b) aligned with the framework adopted in terms of section 27 of the Act.
- (3) An amendment to a municipality's integrated development plan is adopted by a decision taken by a municipal council in accordance with the rules and orders of the council.
- (4) No amendment to a municipality's integrated development plan may be adopted by the municipal council unless-
 - (a) all the members of the council have been given reasonable notice
 - (b) the proposed amendment has been published for public comment for a period of at least 21 days in a manner that allows the public an opportunity to make representations with regard to the proposed amendment;
 - (c) the municipality, if it is a district municipality, has complied with subregulation (5); and
 - (d) the municipality, if it is a local municipality, has complied with subregulation (6)
- (5) A district municipality that considers an amendment to its integrated development plan must:
 - (a) consult all the local municipalities in the area of the district municipality on the proposed amendment; and
 - (b) take all comments submitted to it by the local municipalities in that area into account before it takes a final decision on the proposed amendment
- (6) A local municipality that considers an amendment to its integrated development plan 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.

IDP Amendment Process

Langeberg Municipality is in the process to develop a new MSDF and therefore triggering an amendment of its IDP. In terms of the procedures to be followed in respect of the compilation and adoption of an IDP amendment, there are guidelines that regulate the process and we intend to follow suit.

The following steps will be followed to amend its IDP:

- Develop draft Process Plan and submit to Mayco
- Finalize Process Plan for council approval (31 August)
- Publish notice of the Process Plan and Time schedule
- Call for Public Inputs on the IDP September 2023 till Nov 2023
- Plan, arrange and facilitate the engagements with the community and relevant stakeholders
- Request Inputs from (Directors & OMT's) Dec 2023 till Jan 2024
- Compile the amended IDP making use of the last adopted or amended IDP
- Compile draft memorandum to be submitted to Council
- Table draft IDP amendment to Council together with the memorandum
- Advertise the draft IDP amendment for public comment for a period of 21 days
- Consult with the district municipality on the proposed amendments

- Forward copy of draft amended IDP to the Department of Local Government and Provincial Treasury
- Consider public input received on the IDP amendment and what of these should be factored into the amended IDP submitted for adoption
- Consider any proposals received from the district municipality
- Update draft amended IDP in preparation for submission to Council
- Submit final amended IDP to Council for adoption together with the memorandum
- Submit adopted amended IDP within 10 days of adoption to the MEC for Local Government together with the summary of the process
- Give notice to the public of the adoption of the amended IDP and that it is available for inspection at specified places

8.3 ANNUAL REVISION OF THE IDP

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

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.

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. TIME SCHEDULE: KEY DATES AND RESPONSIBILITIES IN THE PHASES OF THE PROCESS PLAN

ACTIVITIES	RESPONSIBLE PERSON	DATE
AUGUST 2023		
Place quarterly (section 52) report on budget implementation on the municipal website.	Financial Services	31/08/2023
Submit monthly report statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	15/08/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	15/08/2023
Submit the IDP & Budget draft process plan with time schedule to SMT	Financial Services / Strategic Services	20/08/2023
Table in council budget, IDP and SDF Process Plan/time schedule of key deadlines.	Financial Services / Strategic Services	31/08/2023
Previous Year's Financial Statements – Compile and submit municipal audit file to Auditor – General for auditing.	Financial Services	31/08/2023
Consider monthly (section 71) report, review implementation of budget and service delivery and budget implementation plan, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	31/08/2023
Council to approve SDF 23/24 Status Quo report	Mayor Town Planning	31/08/2023
Draft proposed SDF plans per town to relevant Ward Cllrs	Town Planning	31/08/2023
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working day of the start of the month.	Financial Services	15/08/2023
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	15/08/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	15/08/2023

Conclude initial consultation and review, establish direction and policy, confirm priorities, identify other financial and non-financial budget parameters including government allocations to determine revenue envelope, and financial outlook to identify need to review fiscal strategies.	Financial Services	31/08/2023
Consider monthly (section 71) report, review implementation of budget and service delivery and budget implementation plan, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of month.	Financial Services	31/08/2023
SEPTEMBER 2023		
Advertise budget and IDP time schedule in terms of budget consultation policy.	Financial Services / Strategic Services	08/09/2023
Commence process of review of IDP and service delivery mechanisms to gauge impact of new or existing service delivery agreements and long-term contracts on budget where appropriate.	Financial Services / Strategic Services	08/09/2023
Determine strategic objectives for service delivery and development including backlogs for next three-year budget including reviews of other municipal, provincial, and national government sector and strategic plans	Council and SMT	08/09/2023
Initiate public participation process on IDP, Budget and draft SDF proposal plans	Strategic Services	15/09/2023
District IDP Managers Forum	Strategic Services	15/09/2023
Provincial IDP Managers Forum	Strategic Services	15/09/2023
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working day of the start of the month.	Financial Services	14/09/2023
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	14/09/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	14/09/2023
Conclude initial consultation and review, establish direction and policy, confirm priorities, identify other financial and non-financial budget parameters including government allocations to determine revenue envelope, and financial outlook to identify need to review fiscal strategies.	Financial Services	29/09/2023
Consider monthly (section 71) report, review implementation of budget and service delivery and budget implementation plan, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of month.	Financial Services	29/09/2023
Premier's Co-ordinating Forum – Joint consultation with Western Cape Cabinet, HoDs, Municipal Managers and relevant Senior Management.	Municipal Manager	29/09/2023

IDP Indaba 1 – Project and budget alignment and implementation of IDP projects between all three spheres of government using JDMA methodology	Strategic Services	29/09/2023
Ward Cllr comments on draft SDF proposal plans	Town Planning	30/09/2023
Completion of draft CEF and Engagement between consultants, MM and CFO re. draft CEF	Town Planning	30/09/2023
CWDM Mayoral Monday's – Public Participation commence	CWDM	04/09/2023
OCTOBER 2023		
Commence preparation of departmental operational plans and service delivery and budget implementation plan aligned to strategic priorities in IDP and inputs from other stakeholders including government and bulk service providers.	SMT	31/10/2023
Commence preparation of annual report utilizing financial and non-financial information first reviewed as part of the budget and IDP analysis.	SMT	31/10/2023
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	13/10/2023
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	13/10/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	13/10/2023
Submit monthly reports for period ending 30 September for each contract awarded and signed above the prescribed amount.	Financial Services	13/10/2023
Submit quarterly report for period ending 30 September on implementation of the supply chain management policy to the Mayor and make report public.	Financial Services	15/10/2023
Review quarterly projections for period ended 30 September for the SDBIP and compare actual performance to objectives, in conjunction with preparation of section 52 report.	Financial Services	15/10/2023
Table in council quarterly consolidated report for period ending 30 September of all withdrawals not approved in the budget and submit report to the Provincial Treasury and the Auditor-General.	Financial Services	20/10/2023
Submit quarterly (section 52) report for period ending 30 September on implementation of the budget and financial affairs of the municipality to council.	Financial Services	20/10/2023
Conclude first budget draft and policies for initial council discussion.	Financial Services	31/10/2023

Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of month.	Financial Services	31/10/2023
HoD/MM engagement – Joint consultation on providing context to provincial policy priorities.	MM	31/10/2023
Medium-Term Budget Policy Committee – Alignment of provincial and local government policy priorities to applicable departmental and municipal plans and budgets.	MM	31/10/2023
Project Steering Committee (1)– agreement on SDF proposal plans and CEF	Town Planning	15/10/2023
Portfolio Committee – agreement on SDF proposal plans and CEF	Town Planning	30/10/2023
IDP Indaba 1– Project and budget alignment and implementation of IDP projects between all three spheres of government using JDMA methodology.	SMT	31/10/2023
IDP Indaba 1 – Project and budget alignment and implementation of IDP projects between all three spheres of government using JDMA methodology	SMT	31/10/2023
NOVEMBER 2023		
MAYCO – agreement on SDF proposal plans	MAYCO	15/11/2023
Public Sector Participation – Agric Sector Business/Health/Safety & Security etc.	Strategic Services	30/11/2023
Priorities from CWDM and comments from CWDM on SDF proposal plans	Strategic Services	30/11/2023
Ward Based Plan Review, incl. SDF proposal plans	Strategic Services	30/11/2023
Priorities from Directors and Confirmation of acceptance of SDF proposal plans and CEF	Strategic Services	30/11/2023
Commence community and stakeholder consultation process, review inputs, financial models, assess impacts on tariffs and charges and consider funding decisions including borrowing. Adjust estimates based on plans and resources. Further council and management discussion and debate.	SMT	30/11/2023
Place quarterly (section 52) report on budget implementation on the municipal website.	Financial Services	03/11/2023
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	13/11/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	13/11/2023
Submit monthly reports for period ending 31 October for each contract awarded and signed above the prescribed amount.	Financial Services	13/11/2023
Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate	Financial Services	30/11/2023

amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.		
DCF Planning – Strategic engagements between provincial government and municipalities to discuss policy priorities	MM	30/11/2023
DECEMBER 2023		
District IDP Managers Forum	Strategic Services	1/12/2023
Provincial IDP Managers Forum	Strategic Services	7/12/2023
Dept Finance provide working papers for adjustment Budget	Financial Services	10/12/2023
Final draft SDF presented to Council for final comment and confirmation of commencement of public participation (5/1/24-5/3/24)	Town Planning	12/12/2023
Departments provide responses to Adjustment Budget	Financial Services	15/12/2023
Financial inputs from bulk resource providers and agree on proposed price increase.	Financial Services	15/12/2023
Review whether all bulk resource providers have lodged a request with National Treasury and SALGA seeking comments on proposed price increases of bulk resources.	Financial Services	15/12/2023
Finalize first draft of departmental operational plans and SDBIP for review against strategic priorities.	Financial Services	15/12/2023
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	14/12/2023
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	14/12/2023
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	14/12/2023
Finalize first draft of the annual report incorporating financial and non-financial information on performance, audit reports and annual financial statements.	Financial Services	15/12/2023
Submit monthly reports for period ending 30 November for each contract awarded and signed above the prescribed amount.	Financial Services	14/12/2023
Receive audit report on consolidated annual financial statements from the Auditor-General (for municipalities with a municipal entity).	Financial Services	15/12/2023
Ensure that the Accounting Officer addresses any issues raised by the Auditor-General in the audit report, prepare action/audit plans to address and incorporate into the annual report (for municipalities with a municipal entity).	MM	15/12/2023
Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	15/12/2023
JANUARY 2024		
Public participation on amended SDF commences	Town Planning	05/01/2024
Inputs for Operational Budget (Directors & OMT's)	Financial Services	15/01/2024
Approval of Organizational Structure for Budgetary Purpose by MM	Municipal Manager	26/01/2024

Submit Electricity Tariffs to NERSA	Financial Services	26/01/2024
Submit quarterly report for period ending 31 December on implementation of the supply chain management policy to the Mayor and make report public.	Financial Services	15/01/2024
Review quarterly projections for period ending 31 December for SDBIP and compare actual performance to objectives, in conjunction with preparation of section 72 report.	Financial Services	22/01/2024
Ensure any written comments made to bulk resource providers by the municipality on the proposed increase of bulk resources are included in any submission made by the bulk resource providers to the required organs of state.	Financial Services	26/01/2024
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	15/01/2024
Submit monthly statement to the provincial or national organ of state of municipality on allocations received – within 1- working days of the start of the month.	Financial Services	15/01/2024
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	15/01/2024
Submit monthly reports for period ending 31 December for each contract awarded and signed above the prescribed amount.	Financial Services	15/01/2024
Ensure that any municipal entity submits report for period ending 31 December on compliance with the prescribed minimum competency levels to council.	Financial Services	15/01/2024
Note the President's State of the Nation Address for further budget priorities.	Financial Services	20/01/2024
Review whether comments from National Treasury and SALGA have been received on proposed price increases of bulk resources.	Financial Services	20/01/2024
Finalize annual performance report, assessments of arrears on taxes and service charges and an assessment of municipal performance together with recommendations from the council audit committee and details of corrective action undertaken arising from audit report, and minimum competency compliance for inclusion in the annual report.	Strategic Services	25/01/2024
Assess the performance of the municipality to 31 December and submit a (section 72) report on the assessment to the Mayor, Provincial Treasury and National Treasury. Consider an adjustments budget if necessary.	Financial Services	22/01/2024
Further review all aspects of budget including any unforeseen and unavoidable expenditure in light of need for an adjustments budget.	Financial Services	19/01/2024
Where necessary consider tabling and approval of an adjustments budget.	Financial Services	22/01/2024
Table in council quarterly consolidated report for period ending 31 December of all withdrawals not approved in the budget and submit report to the provincial treasury and the Auditor-General	Financial Services	31/01/2024

Table in council quarterly consolidated report for period ending 31 December on compliance with the prescribed minimum competency levels to council, Provincial Treasury and National Treasury.	Financial Services	31/01/2024
Submit quarterly (section 52) report for period ending 31 December on implementation of the budget and financial situation of the municipality to council.	Financial Services	15/01/2024
Consider monthly and mid-year (Section 71 and 72) reports for the period ended 31 December, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP - due end of the month.	Financial Services	22/01/2024
Table in council the annual report of the municipality and any municipal entity for the year ended 30 June.	Strategic Services	31/01/2024
Make public the annual report and invite comments from the local community, submit report to the Auditor-General, Provincial Treasury and Western Cape Department of Local Government.	Strategic Services	31/01/2024
Finalize detailed operating and capital budgets in the prescribed formats incorporating national and provincial budget allocations, integrated and align to IDP and draft SDBIP, finalize budget policies including tariff policy.	Financial Services	31/01/2024
Report to council on status of next three-year budget, previous year's annual report (including annual financial statements, audit report) and summarize overall findings of previous year's annual performance report – reinforce upcoming process of budget approval and oversight.	Financial Services	31/01/2024
FEBRUARY 2024		
Make public the annual report and invite comments from the local community, submit report to the Auditor-General, Provincial Treasury and Western Cape Department of Local Government.	Strategic Services	10/02/2024
Place annual report on the municipal website.	Strategic Services	10/02/2024
IDP Office to provide draft IDP document for scrutiny by departments	Strategic Services	15/02/2024
Departments provide inputs on draft IDP	Strategic Services	22/02/2024
Project alignment between Provincial, District and Local municipalities. Prepare draft IDP document	Strategic Services	23/02/2024
Receive proposed budget from the board of directors of any municipal entity under the sole or shared control of the municipality.	Financial Services	02/02/2024
Place quarterly (section 52) report on budget implementation on the municipal website.	Financial Services	02/02/2024
Consider proposed budget of municipal entity and assess entity's priorities and objectives and make recommendations to the board of directors as necessary.	Financial Services	02/02/2024
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	14/02/2024

Submit monthly statement of the provincial or national organ of state of municipality on allocations received – within 10 working days of the start of the month.	Financial Services	14/02/2024
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	14/02/2024
Submit monthly reports for period ending 31 January for each contract awarded and signed above the prescribed amount.	Financial Services	14/02/2024
Note National budget for provincial and National allocations to municipalities for incorporation into budget.	Financial Services	16/02/2024
Submit tabled adjustments budget to the Provincial Treasury, National Treasury and other affected organs of state.	Financial Services	28/02/2024
Submit the approved adjustments budget to the Provincial Treasury and National Treasury.	Financial Services	28/02/2024
Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	28/02/2024
Finalize corrective measures from audit report.	SMT	28/02/2024
Technical Integrated Municipal Engagement – Technical engagement on governance and mid-year budget assessments and service delivery risks	SMT	29/02/2024
CWDM Mayoral Monday's – Public Participation commence	CWDM	06/02/2024
MARCH 2024		
Closing date for public comment on amended draft SDF	Town Planning	05/03/2024
Project Steering Committee (2) consider all inputs and agree on final draft SDF for submission to Council	Town Planning	12/03/2024
Receive notification of any transfers that will be made to the municipality from other municipalities in each of the next three financial years.	Financial Services	01/03/2024
Provide notification of any transfers that will be made by the municipality to other municipalities in each of the next three financial years.	Financial Services	01/03/2024
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	14/03/2024
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	14/03/2024
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	14/03/2024
Receive bulk resource providers' price increased as tabled in Parliament for the Western Cape Provincial Legislature.	Financial Services	01/03/2024

Submit monthly reports for period ending 28 February for each contract awarded and signed above the prescribed amount.	Financial Services	14/03/2024
Receive revised budget of municipal entity from board of directors.	Financial Services	01/03/2024
Incorporate transfers to be made to or received from other municipalities.	Financial Services	01/03/2024
Incorporate changes in prices for bulk resources and finalize tariff proposals for all charges.	Financial Services	01/03/2024
Print and distribute all budget documentation prior to meeting at which budget is to be tabled.	Financial Services	19/03/2024
Table in council the draft annual budget and IDP supporting documents. Final SDF presented.	Executive Mayor	29/03/2024
Consider and approve, reject or refer back the annual report at a council meeting.	Strategic Services	29/03/2024
Adopt an oversight report providing comments on the Annual Report.	Strategic Services	29/03/2024
Attend council and committee meetings where Annual Report is discussed and respond to questions	Strategic Services	29/03/2024
Submit minutes of meetings where Annual Report is discussed to the Provincial Treasury and Western Cape Department of Local Government.	Strategic Services	29/03/2024
Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendments to the SDBIP – due end of the month.	Strategic Services	29/03/2024
District IDP Managers Forum	Strategic Services	01/03/2024
Provincial IDP Managers Forum	Strategic Services	09/03/2024
APRIL 2024		
Make public the tabled annual budget and accompanying budget documentation, IDP and SDF, invite the community to submit representations and submit to the Provincial Treasury, National Treasury and other affected organs of state.	Financial Services Strategic Services Town Planning	06/04/2024
Council adopted LSDF submitted to MEC for Local Government, within 10 days of adoption	Town Planning	06/04/2024
Commence process of consultation on tabled budget, publicize and conduct public hearings and meetings with wards, Provincial Treasury and other organs of state making a budget submission. Publish ward based information for ward councillors.	Financial Services / Strategic Services	02/04/2024
Confirm provincial and national budget allocations	Financial Services	22/04/2024
Make public the oversight report.	Strategic Services	02/04/2024

Submit the annual report and oversight report to the Western Cape Provincial Legislature.	Strategic Services	07/04/2024
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	15/04/2024
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	15/04/2024
Submit monthly report on salaries and wages expenditure to council – within 10 working days of the start of the month.	Financial Services	15/04/2024
Submit monthly reports for period ending 31 March for each contract awarded and signed above the prescribed amount.	Financial Services	15/04/2024
Submit quarterly report for period ending 31 March on implementation of the supply chain management policy to the Mayor and make report public.	Financial Services	15/04/2024
Table in council quarterly consolidated report for period ending 31 March of all withdrawals not approved in the budget and submit report to the Provincial Treasury and Auditor-General.	Financial Services	30/04/2023
Submit quarterly (section 52) report for period ending 31 March on implementation of the budget and financial state of affairs of the municipality to council.	Financial Services	15/04/2024
Conclude process of consultation on tabled budget and IDP with community and other stakeholders and assist Mayor to revise budget following feedback, taking into account the results of the third quarter (section 52) report.	Financial Services Strategic Services	30/04/2024
Consider the views of the community and other stakeholders.	Financial Services Strategic Services	30/04/2024
Respond to submissions received and if necessary, revise the budget and table amendments for council consideration.	Financial Services Strategic Services	30/04/2024
Consider monthly (section 71) report, review implementation of SDBIP, identify problems and amend or recommend appropriate mechanisms. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	30/04/2024
SIME LG MTEC: IDP and assessments – Provincial Government and Municipality to discuss findings and recommendations emanating from IDP and Budget assessment. Integrated input into draft IDP and Budget.	SMT	30/04/2024
MAY 2024		
Preparing final IDP and Budget documentation for final approval by council, review any other comments from National, or Provincial Government or organ of state.	Financial Services Strategic Services	15/05/2024
Respond to submissions received and if necessary, revise the budget and table amendments for council consideration.	Financial Services Strategic Services	15/05/2024
Place quarterly (section 52) report on budget implementation of the municipal website.	Financial Services	03/05/2024

Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	15/05/2024
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	15/05/2024
Submit monthly report on salaries and wages expenditure to council – within 10 working day of the start of the month.	Financial Services	15/05/2024
Submit monthly reports for period ending 30 April for each contract awarded and signed above the prescribed amount.	Financial Services	15/05/2024
Print and distribute all budget documentation including draft IDP and SDBIP documentation prior to meeting at which budget and IDP is to be approved.	Financial Services Strategic Services	15/05/2024
Consider approval of the IDP, SDF and annual budget	Council	31/05/2024
Develop plan of action to start on preparation of annual financial statements, communicate what is to be done.	Financial Services	31/05/2024
Distribute adopted IDP and associated supplementary documents to the MEC for Local Government.	Strategic Services	31/05/2024
Consider monthly (section 71 report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	31/05/2024
JUNE 2024		
Submit draft SDBIP to the Mayor – final date under legislation 14 July.	Strategic Services	14/06/2024
Submit draft annual performance agreements for the next year to the Mayor – final date under legislation 14 July.	Strategic Services	30/06/2024
Approve SDBIP – final date under legislation 28 July.	Strategic Services	30/06/2024
Submit monthly report on the budget to the Mayor, Provincial Treasury and National Treasury – within 10 working days of the start of the month.	Financial Services	14/06/2024
Submit monthly statement to the provincial or national organ of state or municipality on allocations received – within 10 working days of the start of the month.	Financial Services	14/06/2024
Submit monthly reports for period ending 31 May for each contract awarded and signed above the prescribed amount.	Financial Services	14/06/2024
Submit approved budget to National and Provincial Treasury	Financial Services	07/06/2024
Consider monthly (section 71 report, review implementation of SDBIP, identify problems and amend or recommend appropriate amendments. Submit report to council and make public any amendment to the SDBIP – due end of the month.	Financial Services	30/06/2024
District IDP Managers Forum	Strategic Services	1/06/2024
Provincial IDP Managers Forum	Strategic Services	6/06/2024
Conduct planning alignment engagements between district and local municipalities	Strategic Services	30/06/2024

JULY 2024

Make public the SDBIP.	Strategic Services	14/07/2024
Make public annual performance agreements and ensure copies are provided to council.	Strategic Services	14/07/2024
Place annual performance agreements on the municipal website.	Strategic Services	14/07/2023
Compile the IDP & Budget draft Time schedule 2025/26	Financial Services Strategic Services	30/07/2024

~ MEMORANDUM ~			
<u>AAN / TO</u>	The Municipal Manager Mr D Lubbe	<u>VAN / FROM</u>	Manager: Town Planning Ms. T Brunings
<u>VERW / REF</u>	LSDF 23/24	<u>DATUM / DATE</u>	17 August 2023
<u>ONDERWERP SUBJECT</u>	MEMO FOR EXECUTIVE MAYOR: PROCESS PLAN FOR FINALISING THE LANGEBERG LOCAL MUNICIPAL SPATIAL DEVELOPMENT FRAMEWORK (LSDF)		

Dear Sir,

I refer to the request from the Director: Strategic Services for a memo setting out the key steps in the SDF process in relation to the IDP process plan. Sections 3.2.1.to 3.2.5 below outline the way forward to finalise the SDF.

1. Background:

- 1.1. The Langeberg Spatial Development Framework Plan, 2015 (LSDF) has successfully served its purpose of guiding land use decision-making in the municipal area for the past 8 years. Given the time which has elapsed, it was deemed necessary to rewrite the SDF and outline an updated development agenda which considers new development pressures and identifies the spatial and financial requirements of future plans for development, looking towards 2030.
- 1.2. Tender 71/2021 to re-write the Langeberg Municipal Spatial Development Framework was awarded to CK Rumboll and Partners-Planning in June 2022. The Municipal Systems Act, 32/2000 (MSA) requires that the Municipality adopt an SDF concurrently with the adoption of the IDP. Accordingly, it was intended that the SDF rewrite coincide with the adoption of the 5th generation IDP by June 2023.
- 1.3. The SDF rewrite progressed rapidly, with the establishment of a Project Steering Committee and the preparation and approval of a status quo report, and a draft SDF report and plans. At its February 2023 meeting, Council approved the final draft SDF and the commencement of the Public Participation Process. The final draft SDF was advertised in the Breede River Gazette and Government Gazette, for a 60-day commenting period. This participation process was conducted as per legislative requirements, which included meetings with the public and external stake holders.

2. Current Status:

- 2.1. Arising from the participation process and particularly comments received from DEA&DP, a number of gaps were identified which require further attention to ensure a complete and implementable SDF. Council agreed with the submissions made and consequently decided that the existing SDF (2015) will remain in use for 2023/24. The new deadline for the approval of the new SDF is the end of May 2024, as an IDP amendment. The SDF process plan must therefore dovetail with the current IDP process plan.

3. Way forward to ensure the new SDF is ready for adoption as an IDP amendment in May 2024:

- 3.1. Sections 3 – 8 of the Langeberg Land Use Planning By-Law, 2015(the bylaw) guide the LSDF content and procedure (extracts of Sections 7 and 8 attached herewith). The approval and adoption of the LSDF will be undertaken in accordance with the by-law, the MSA 2000, SPLUMA 2013 and LUPA 2014.
- 3.2. The way forward to finalise the SDF is summarized in terms of the following phases:
 - 3.2.1. Phase 1 – The Status Quo report has been approved but requires amendment to specifically address the following: *assessment of the existing levels of development and development challenges in the municipal area*. The Status Quo report must be approved by Council. Proposed date 31/08/2023.

- 3.2.2. Phase 2 - First Draft: The draft marked Version 7, dated March 2023, is the first draft which was submitted to Council for approval in February 2023.
- 3.2.3. Phase 3 - Public Participation: Public participation took place during March and April 2023, but a further 60 day commenting period will be required for the final draft SDF as the changes required to the first draft will be materially different.
- 3.2.4. Phase 4 - Amendments and drafting of final draft: CK Rumboll, in liaison with the Town Planning Department, is currently attending to the comments which arose out of the participation process. The focus is on building the Capital Expenditure Framework component of the LSDF as well as on the implementation chapter. Amended drafts will be submitted to the Project Steering Committee before being submitted to Council.
- 3.2.5. Phase 5 - Final SDF: report and plans endorsed by Council: The amended draft SDF will be presented to Council on 12 December 2023. Thereafter the 60 days final public notification process will run from January to March 2024. Council may adopt the amended final draft SDF with or without amendments simultaneously with the IDP and annual budget. A response will also be submitted to Province advising how their comments have been addressed (requirement of Section 8(1)(f)(i) of the bylaw).

- 3.3. Within 14 days of Council's decision to adopt a new SDF, Council must give notice of its decision in the media and the Provincial Gazette.

Yours faithfully



TL BRUNINGS
MANAGER: TOWN PLANNING

The required procedure as set out in the LLUPB, 2015 is as follows:

7. (1) If the Council does not establish an intergovernmental steering committee to compile or amend its municipal spatial development framework, the project committee must-
 - (a) compile a draft *status quo* report setting out an assessment of the existing levels of development and development challenges in the municipal area and submit it to the Council for adoption;
 - (b) after adoption of the *status quo* report, compile a first draft of the municipal spatial development framework or first draft of the amendment of the municipal spatial development framework and submit it to the Council to approve the publication thereof for public comment;
 - (c) after approval of the first draft of the municipal spatial development framework or first draft of the amendment of the municipal spatial development framework for publication contemplated in paragraph (b), submit the first draft of the municipal spatial development framework or first draft of the amendment of the municipal spatial development framework to the Provincial Minister for comment in terms of section 13 of the Land Use Planning Act; and
 - (d) after consideration of the comments and representations received from the public and the Provincial Minister, submit the final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework, with any further amendments, to the Council for adoption.
- (2) If the final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework contemplated in subsection (1) is materially different to what was published in terms of subsection (1) (b), the Municipality must follow a further consultation and public participation process before the municipal spatial development framework or amendment of the municipal spatial development framework is adopted by the Council.
- (3) The Council must adopt the final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework, with or without amendments, and must within 14 days of its decision give notice of its decision in the media and the Provincial Gazette.

Functions and duties

8. (1) The members of the project committee must, in accordance with the directions of the executive mayor-
 - (a) oversee the compilation of the municipal spatial development framework or drafting of an amendment of the municipal spatial development framework for adoption by the Council;
 - (b) provide technical knowledge and expertise to the Council;
 - (c) ensure that the compilation of the municipal spatial development framework or drafting of the amendment of the municipal spatial development framework is progressing according to the process contemplated in section 3(2)(a)(ii);
 - (d) guide the public participation process and ensure that the registered stakeholders remain informed;

- (e) oversee the incorporation of amendments to the draft municipal spatial development framework or draft amendment of the municipal spatial development framework based on the consideration of the comments received during the process of drafting thereof;
- (f) oversee drafting of-
 - (i) a report in terms of section 14 of the Land Use Planning Act setting out the response of the Municipality to the provincial comments issued in terms of section 12(4) or 13(2) of that Act; and
 - (ii) a statement setting out-
 - (aa) whether the Municipality has implemented the policies and objectives issued by the national minister responsible for spatial planning and land use management and if so, how and to what extent the Municipality has implemented it; or
 - (bb) if the Municipality has not implemented the policies and objectives, the reasons for not implementing it.
- (g) ensure alignment of the municipal spatial development framework with the development plans and strategies of other affected municipalities and other organs of state as contemplated in section 24(1) of the Municipal Systems Act;
- (h) facilitate the integration of other sector plans into the municipal spatial development framework; ...