



**JOE MOROLONG**  
LOCAL MUNICIPALITY

# **2024/25 IDP/BUDGET/PMS PROCESS PLAN**

*2025/26 PREPARATION PERIOD*

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## **1. Introduction**

The Integrated Development Planning process is a process of consultation, participation and information sharing. Stakeholder involvement is the cornerstone of the review and refinement of the IDP. The vision for improved quality of life can be achieved through partnership with stakeholders.

Section 23 of the Municipal Systems Act of 2000 requires municipalities to undertake developmentally orientated planning to ensure that it:-

- Strives to achieve the objectives of local government set out in Section 152 of the Constitution
- Gives effect to its developmental duties as required by Section 153 of the constitution, and together with other organs of state contribute to the progressive realization of the fundamental rights contained in sections 24, 25, 26, 27 and 29 of the Constitution.

### **1.1 Process for Planning, Drafting, Adopting and Review of Integrated Development Plans**

The process is explained in sections 27 – 34 of the Municipal Systems Act of 2000. The district municipality is required to develop a framework plan after consultation with local municipalities in its area.

A framework plan 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 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 terms of those matters; and
- d) 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 the essential amendments to the framework

### **1.2 Adoption of process**

Section 28 of the MSA states the following:

- a) 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.

- b) The municipality must give notice to the local community of particulars of the process it intends to follow.

### **1.3 Annual Budget**

The annual budget and the IDP are inextricably linked to one another, something that has been formalised through the promulgation of the Municipal Finance Management Act (MFMA) No 56 of 2003. Chapter 4, Section 21(1) of the MFMA indicates that the Mayor of a municipality must:

- (a) At least 9 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 the integrated development plan in terms of section 34 of the Municipal Structures Act; and the budget related policies.
  - (iii) The tabling and adoption of any amendments to the integrated development plan and the budget-related policies; and
  - (iv) The consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).

### **1.4 Service Delivery and Budget Implementation Plan (SDBIP)**

The Service Delivery and Budget Implementation Plan (SDBIP) is an implementation plan of the approved Integrated Development Plan (IDP) and Medium-Term Revenue and Expenditure Framework. Therefore, only projects that are budgeted for are implemented.

The SDBIP serves to address the development objectives as derived from the approved IDP.

Section 1 of the MFMA defines the SDBIP as:

- (a) Detailed plan approved by the mayor of a municipality in terms of section 53(1)(c)(ii) for implementing the municipality's delivery of services and the execution of its annual budget and which must include (as part of the top-layer) the following:
  - (i) Revenue to be collected, by source; and
  - (ii) Operational and capital expenditure, by vote.
- (b) Service delivery targets and performance indicators for each quarter.

### **1.5 Spatial Development Framework (SDF)**

A Spatial Development Framework (SDF) is to a large extent influenced by the following legislation:

- (a) The Local Government: Municipal Systems Act (Act No. 32 of 2000);
- (b) The IDP and Performance Management Regulations (2001);
- (c) The Spatial Planning and Land Use Management Act (Act No. 16 of 2013);

In preparing an SDF, Section 20(1) of SPLUMA requires the following:

- (a) The Municipal Council of a municipality must by notice in the *Provincial Gazette* adopt a municipal spatial development framework for the municipality.
- (b) The municipal spatial development framework must be prepared as part of a municipality's integrated development plan in accordance with the provisions of the Municipal Systems Act.
- (c) Before adopting the municipal spatial development framework and any proposed amendments to the municipal spatial development framework, the Municipal Council must:
  - (a) Give notice of the proposed municipal spatial development framework in the Gazette and the media;
  - (b) Invite the public to submit written representations in respect of the proposed municipal spatial development framework to the Municipal Council within 60 days after the publication of the notice referred to in paragraph (a); and
  - (c) Consider all representations received in respect of the proposed municipal spatial development framework.

## **2. Institutional Arrangements**

Joe Morolong Local Municipality IDP Review Process will be guided by the following structures:

- IDP/Budget/PMS Steering Committee
- IDP Representative Forum

### **2.1 IDP/Budget/PMS Steering Committee**

The IDP/Budget/PMS Steering Committee is a strategic, political and technical working team who make political and technical decisions and inputs that must ensure a smooth compilation and implementation of the IDP/Budget/PMS processes. The committee also has a responsibility of recommending the budget document as well as any other budget related issues such as changes in internally funded projects, before the approval by Council.

The IDP Steering Committee consists of the Mayor, Speaker, EXCO Members, internal Directors, IDP/PMS Manager, Budget Manager, and PMDS Manager, and Heads of sector Departments as well as representatives of the District Municipality. The committee will be chaired by the mayor and in his/her absence, a delegated EXCO member. Secretariat function will be provided by the Municipal Manager's Office.

#### **2.1.1 Terms of reference for the IDP Steering Committee**

The summarized terms of reference for the IDP Steering Committee are as follows:

- Provides terms of reference for the various planning activities

- Commissions research studies
- Considers and comments on:
  - (a) Inputs from sub-committee/s, study teams and consultants
  - (b) Inputs from provincial sector departments and support providers
- Processes, summarizes and document outputs
- Makes content recommendations
- Prepares, facilitates and document meetings
- Verify facts identified in the IDP Representative Forum

## 2.2 IDP Representative Forum

The forum consists of different stakeholders, including sector departments, the district municipality, parastatals, interest groups and Councillors.

### 2.2.1 Terms of reference for the IDP Representative Forum

The summarized terms of reference for the IDP Representative Forum will be based on the composition of the constituency’s interests in the IDP process, and it should be to:

- Serve as a consultative forum
- Represent the interest of the municipality’s constituency in the IDP process
- Provide an organizational mechanism for discussion, negotiation and decision making between the stakeholders inclusive of municipal government
- Ensure communication between all the stakeholder representatives
- Monitor the performance of the planning and implementation process
- Ensure alignment of programmes

## 3. Roles and Responsibilities

### 3.1 Internal Roles and Responsibilities

Role Player	Roles and Responsibilities
<b>Council</b>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Final decision making</li> <li>• Approval of the reviewed IDP documentation</li> <li>• Ensuring horizontal alignment of the IDP’s of the municipalities in the District Council area.</li> <li>• Ensuring vertical alignment between the district and local planning</li> <li>• Facilitation of vertical alignment of IDP’s with other spheres of government and sector departments</li> <li>• Linking the IDP process with their constituencies</li> <li>• Organizing public participation</li> </ul> <p><b>PMS</b></p> <ul style="list-style-type: none"> <li>• Final decision making</li> <li>• Consider and adopt final report</li> <li>• Consider and approve the performance agreement of the Accounting Officer and Directors</li> </ul>

Role Player	Roles and Responsibilities
	<ul style="list-style-type: none"> <li>• Popularizing PMS within their constituencies</li> </ul> <p><b>Budget</b></p> <ul style="list-style-type: none"> <li>• Final decision making</li> <li>• Approve the budget before the start of the financial year</li> <li>• Council to approve unforeseen and unavoidable expenses</li> <li>• Approve Service Delivery and Budget Implementation Plan</li> </ul>
<b>Mayor</b>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Responsible for overseeing the process</li> <li>• Political responsibility and accountability regarding the process</li> </ul> <p><b>PMS</b></p> <ul style="list-style-type: none"> <li>• Establishing the performance agreement for the Municipal Manager in terms of the PMS</li> <li>• Determine KPA's for AO based on institutional KPI's</li> <li>• Determine the performance objectives and targets that the AO must meet in relation to the KPA's</li> <li>• Negotiate the performance objectives and targets that the AO must meet</li> <li>• Submit draft performance agreement for the AO via EXCO to the Council for consideration and approval</li> <li>• Conclude and sign performance agreement with the AO on behalf of Council</li> </ul> <p><b>Budget</b></p> <ul style="list-style-type: none"> <li>• Table budget to Council at least 90 days before the start of the financial year.</li> <li>• Table budget timetable to Council.</li> <li>• Report authorization of unforeseeable and unavoidable expenses at Council meeting after having authorized such expenses.</li> <li>• Submit SDBIP to Council, 14 days after approval of budget</li> <li>• Ensure conclusion of management's performance agreements</li> </ul>
<b>Municipal officials</b>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Provide technical/sector expertise through the IDP Steering Committee (Senior officials)</li> <li>• Prepare Selected Sector Plans</li> <li>• Provide comments on the IDP Review document</li> </ul> <p><b>PMS</b></p> <ul style="list-style-type: none"> <li>• Setting KPI's for administrative components and service providers</li> <li>• Prepare progress reports for extended management meetings</li> <li>• Reporting on the performance measures</li> <li>• Verification of interim PMS measurement results</li> </ul>
<b>Municipal Manager, CFO, Director Planning and Development Planning, Manager IDP/PMS</b>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Decide on planning process</li> <li>• Monitor process</li> <li>• Overall Management and co-ordination</li> </ul> <p><b>PMS</b></p> <ul style="list-style-type: none"> <li>• Submission of annual performance report to Council for approval</li> <li>• Submit report to the Council about mechanisms, systems and processes for auditing the results of performance measurements as part of the internal auditing process</li> <li>• Establishment of a performance audit committee</li> <li>• Entering into performance agreements with departmental heads (Directors)</li> <li>• Performance monitoring</li> <li>• Submission of approved annual performance report, together with financial statements, to the Auditor General</li> <li>• Receive External Auditors report.</li> <li>• Submission of Audit report via EXCO to Council within 1 month of receipt.</li> <li>• Within 14 days of adopting the annual report, submit a copy of the report to the MEC for local government in the province</li> </ul>

Role Player	Roles and Responsibilities
	<ul style="list-style-type: none"> <li>• Submit a copy of the report to the Auditor General and any other institutions prescribed by regulation</li> </ul> <p><b>Budget</b></p> <ul style="list-style-type: none"> <li>• Give notice of bank account to National Treasury (NT) and Auditor General (AG)</li> <li>• Supply NT and AG with a list of bank accounts</li> <li>• Table consolidated report of all withdrawals from bank account to Council within 30 days after the end of each quarter</li> <li>• Submission of draft budget implementation plan to Mayor within 14 days after approval of the budget</li> <li>• Perform mid-year performance assessment of the municipality and the submission of the report to the Mayor</li> <li>• The submission of the annual financial statements to the AG within two months after the end of the Financial Year</li> <li>• Submission of annual oversight reports to the Provincial Legislature within 7 days after adoption by Council</li> </ul>
<p><b>Manager: IDP/PMS and IDP/ PMS Officer</b></p>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Ensure that the Process Plan is finalized and adopted by Council</li> <li>• Day-to-day management of the IDP process</li> <li>• Ensure continuous and improved participation of role players through IDP and other means</li> <li>• Prepare documentation and submissions</li> <li>• Coordinate the preparation of the Sector Plans and their inclusion into the IDP documentation</li> <li>• Co-ordinate the inclusion of the Performance Management System (PMS) into the revised IDP</li> <li>• Submit the reviewed IDP to the relevant authorities</li> </ul> <p><b>PMS</b></p> <ul style="list-style-type: none"> <li>• Performance management review, planning and preparation</li> <li>• Prepare documentation and submissions</li> <li>• Day-to-day management of the PMS process</li> </ul> <p><b>Budget</b></p> <ul style="list-style-type: none"> <li>• Interact with Budget Officer for alignment of processes</li> <li>• Ensuring IDP process conducted timeously for budgeting purposes</li> </ul>
<p><b>CFO</b></p>	<p><b>IDP</b></p> <ul style="list-style-type: none"> <li>• Interact with IDP Manager to ensure that processes are aligned</li> <li>• Ensuring that budget proposals are in line with the IDP</li> </ul> <p><b>Budget</b></p> <ul style="list-style-type: none"> <li>• Ensure that the Process Plan is finalized and adopted by Council</li> <li>• Day-to-day management of the budgeting process</li> <li>• Make information available to staff members for budgeting purposes</li> <li>• Prepare documentation and submissions;</li> <li>• Ensure draft budget is in place for submission to Council</li> </ul>

### 3.2 External Roles and Responsibilities

Role Player	Roles and Responsibilities
<p>Government Departments</p>	<ul style="list-style-type: none"> <li>• Provide data and information</li> <li>• Budget guidelines</li> <li>• Alignment of budgets with the IDP</li> <li>• Provide professional and technical support (sector specialisation)</li> </ul>
<p>NGOs and Other Businesses</p>	<ul style="list-style-type: none"> <li>• Provide inputs</li> </ul>



#### **4. Mechanism for Participation**

Chapter 4 of the MSA requires municipalities to involve communities and stakeholders in the IDP Review process.

Four major objectives said to be the motive behind the public participation process namely:

- Needs orientation
- Appropriateness of solutions
- Empowerment

Joe Morolong Local Municipality will confirm the following mechanisms for participation:

##### **4.1 IDP Representative Forum**

This forum will represent all stakeholders and will be as inclusive as possible. Efforts will be made to bring additional organizations into the Representative Forum and ensure their continued participation throughout the process.

##### **4.2 Media**

Local newspapers and the Municipal website will be used to inform the community of the progress of the 2025/26 IDP and Budget. Adverts will be placed in the local newspapers. The **first** one at the beginning of the process inviting the public to participate. The **second** advert will be placed once the draft budget and IDP are in place inviting the public to comment. The **third** advert will be placed after the adoption of the 2025/26 IDP and budget. Adverts will also be posted to all municipal satellite offices, local libraries and Tribal offices.

##### **4.3 IDP/Budget/PMS Steering Committee**

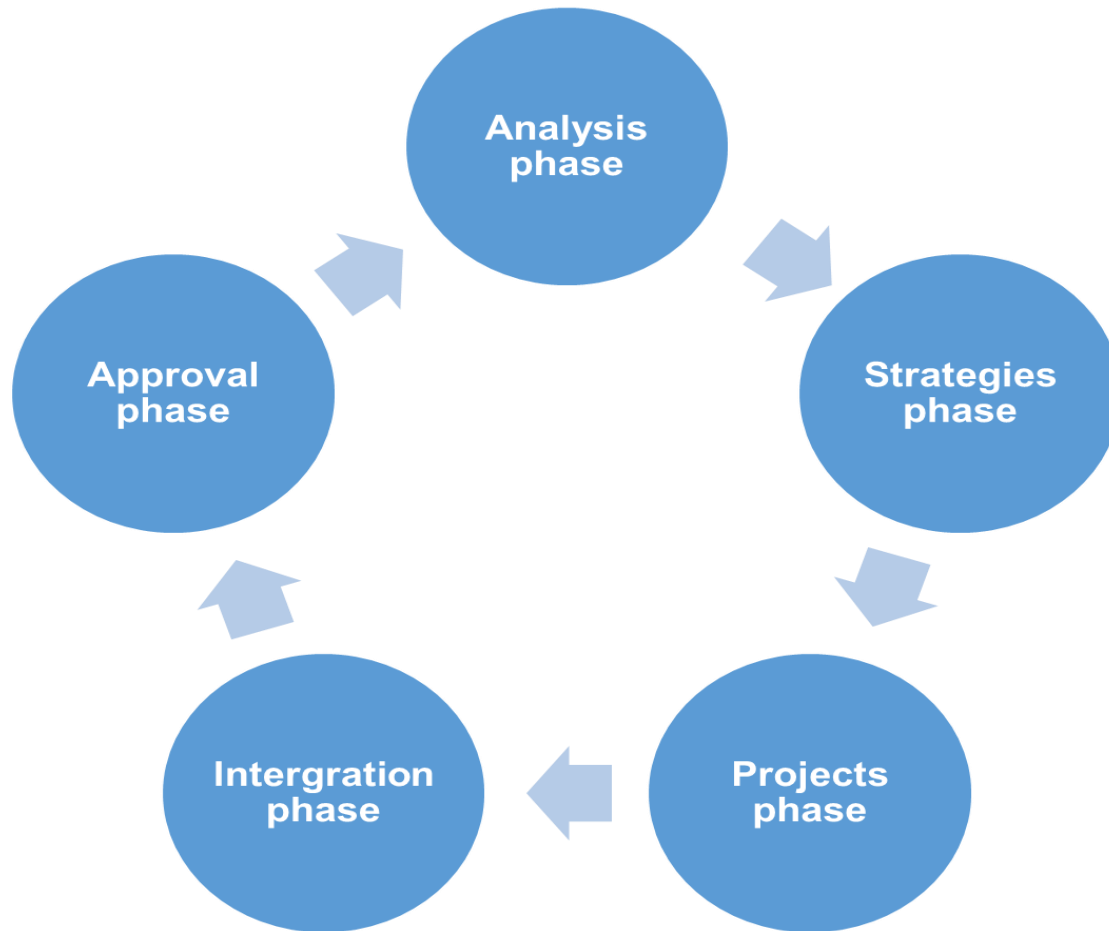
This will consist of Exco, Section 56 (MSA, 2000) management and other layers of management participating in an IDP process.

##### **4.4 Council Approval**

The Council will consider, for comments, a Draft 2025/2026 IDP/Budget Review documents by March 2025. This will ensure inclusion into the National and Provincial budgeting processes as well as inform the municipal budgeting process. The final IDP/Budget Review will be adopted by May 2025. Sector Plans will be approved by Council on their completion.

## 5. Phases of the IDP and Budget Process

The phases of the IDP and Budget process is indicated in the diagram below. The process speaks to analysis, strategies, projects and approval of the IDP, Budget and PMS.



The table below summarizes the important activities and deliverables to be considered during the different phases of the IDP Process:

Phase	Activities	Directorates/ Structure
Preparation	Approval of IDP Process Plan	Council
Analysis	Conduct community needs analysis through a comprehensive process of public participation	Executive Mayor Director: Economic Development, Planning and Tourism
	Conduct a socio-economic analysis	All Directorates
	Conduct an organizational SWOT analysis	All Directorates
Strategy	Develop strategic objectives through a strategic planning session of Council	Council
	Set specific service delivery and development targets	All Directorates

	Review all sector plans	All Directorates
Projects	Develop business plans to give effect to the strategic objectives of Council	Municipal Manager
Integration	Horizontal and vertical alignment of council strategic objectives with other spheres of government	Council All directorates
	Actively participate in relevant inter-governmental Engagements	Mayor
Approval	Apply all legislative requirements to ensure the credibility of the IDP process	Council

## 6. Mechanism of Alignment

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 area of jurisdiction. In doing so, proper consultation, co-ordination and alignment of the IDP processes of the district municipality and various local municipalities can be maintained.

The IDP process must align horizontally with neighboring municipalities especially from a spatial and economic perspective. Due to the fact that a number of sector plans such as the SDF and the Disaster Management Plan form an integral part of the municipal IDP, it is important that the following national and provincial policy documents are also taken into account when Joe Morolong Local Municipality draft its

IDP:

- National Development Plan (NDP)
- Provincial Strategic Development Plan
- Provincial Spatial Development Framework

## 7. Binding Legislation

The following pieces of National and Provincial legislation in conjunction with the South African institution will represent binding legislation that will guide the process:

### 7.1 Legal and policy Framework

- The Constitution of the Republic of South Africa: (Act 108 of 1996)
- Spatial Planning and Land Use Management Act (SPLUMA) (16 of 2013)
- White paper on Local Government of 1998
- Municipal Structures Act 117 of 1998
- Municipal Systems Act 32 of 2000

- Municipal Finance Management Act: 2003
- Municipal Property Rates Act: 2004
- All other applicable local government legislation and policies

## 7.2 Policy Planning Framework

- Provincial Growth & Development Plan (PGDP)
- Spatial Development Plan
- National Spatial Development Perspective (NSDP)
- National Development Plan 2030
- District Municipal Economic and development plans

## 8. Public Participation

The planning process will be informed by extensive public participation in which all municipal stakeholders will be invited to and supported to play a meaningful influencing role in all recommendations and key planning decisions. This will be in the form of organized workshops and sector engagement meetings involving:

- IDP Representative Forum
- Sector departmental engagement sessions
- Strategic and regular announcements made, newsletters, newspapers, municipal notice boards
- Training of Councillors and Magosi on community development
- Community based participatory planning sessions
- Annual Report and IDP/Budget Roadshows
- Sector Forums

## 9. Action Programme

**Activity Table Per Phase**

Activity Table Per Phase		
Time Frames	Process of IDP	Output
<b>July – August 2024</b>	<ul style="list-style-type: none"> <li>• Development and submission of IDP/Budget/PMS Process Plan to Council</li> <li>• Develop an IDP/Budget Schedule</li> </ul>	<ul style="list-style-type: none"> <li>• IDP/Budget and PMS Process Plan adopted by Council and submitted to MEC and Website</li> <li>• IDP/Budget/PMS Activity Schedule adopted by Council</li> </ul>

### Activity Table Per Phase

Time Frames	Process of IDP	Output
<b>September - November 2024</b>	<ul style="list-style-type: none"> <li>• Review of the status quo on the developmental sectors</li> <li>• Needs identification through:</li> <li>• Inputs from sector departments</li> <li>• Inputs from Wards and Sector Forums</li> <li>• Review Budget Process (Review budget process, content and compliance with legislative requirement)</li> <li>• Departmental Strategic Planning Sessions – assess status quo, SWOT analysis, key issues for consideration</li> </ul>	<ul style="list-style-type: none"> <li>• Draft situational analysis report</li> <li>• Departmental SWOT analysis and status quo reports</li> <li>• Budget estimates (All income source, MTEF &amp; Implementing agents &amp; Council)</li> </ul>
<b>December 2024</b>	<ul style="list-style-type: none"> <li>• Technical Strategic Planning session</li> <li>• Departments submit</li> <li>• Draft Operational budgets</li> </ul>	<ul style="list-style-type: none"> <li>• Technical Strategic Plan Report</li> <li>• Draft Departmental Budgets</li> </ul>
<b>February 2025</b>	<p>Institutional Strategic Planning Session</p> <ul style="list-style-type: none"> <li>• Review and align Municipal Vision (What does the municipality want to achieve?)</li> <li>• Align Vision, Objectives and Strategies, Project (phase two) Identification/ prioritisation per municipality</li> <li>• Review of the Organogram</li> </ul>	<p>Institutional Strategic Planning Report</p> <ul style="list-style-type: none"> <li>• Reviewed Vision, Strategies</li> <li>• Reviewed Organogram</li> </ul>
<b>February 2025</b>	<ul style="list-style-type: none"> <li>• First Draft IDP</li> <li>• Prepare business plans for projects</li> </ul>	<ul style="list-style-type: none"> <li>• Review Budget</li> <li>• Draft IDP</li> <li>• Final list of projects with business plans</li> </ul>
<b>March 2025</b>	<ul style="list-style-type: none"> <li>• Mayor table the Draft IDP/Budget and Tariffs with Sector Plans to Council</li> </ul>	<ul style="list-style-type: none"> <li>• Draft IDP and Budget approved by Council</li> <li>• Submission of Draft IDP and Budget to CoGHSTA, Treasury, Office of the Premier and Website</li> </ul>
<b>April 2025</b>	<ul style="list-style-type: none"> <li>• Roadshows on the Draft IDP/Budget and Tariffs</li> <li>• Integration of comments</li> </ul>	<ul style="list-style-type: none"> <li>• IDP Roadshow Report</li> <li>• Final Draft IDP and Budget</li> </ul>
<b>May 2025</b>	<ul style="list-style-type: none"> <li>• Submission of the Final IDP and Budget to Council for adoption</li> </ul>	<ul style="list-style-type: none"> <li>• Draft IDP and Budget approved by Council</li> <li>• Submission of Draft IDP and Budget to CoGHSTA, Treasury, Office of the Premier and Website</li> </ul>

## 10. Adoption of the IDP/Budget by the Council

The Municipal Councils will adopt the revised documents as legislated and within the timeframes provided.

## 11. IDP/ Budget/ PMS Process Plan

The following table is attached and illustrates the IDP Review action programme and also gives an indication to the planning activities that will be undertaken in a calendar format.

**JOE MOROLONG LOCAL MUNICIPALITY IDP/ BUDGET/ PMS PROCESS PLAN 2024/25 FINANCIAL YEAR**

**(2025/2026 PREPARATION PERIOD)**

<b>Phases</b>	<b>Target/Activity</b>	<b>Approach</b>	<b>Role Players/Stakeholders</b>	<b>Time Frames</b>	<b>Mechanisms/ Tools</b>
Preparation	Development of the 2024/2025 IDP/Budget/PMS Process Plan in accordance with the relevant legislation	Inputs from departmental heads, then submission to council for adoption	IDP/PMS Manager and Budget and Reporting Manager, Senior Management, EXCO	July - Aug 2024	Desktop and Meetings
	Alignment with JTG District IDP, Budget and PMS Framework	Desktop	IDP/PMS Manager	July 2024	Desktop
	Consultations on the Review and adoption of the 2024/2025 process plan	Publish notice on local newspaper for comments	All stakeholders	July 2024	Public Notice
		Joe Morolong IDP Representative Forum	All stakeholders	Aug 2024	Meetings
		Consultations and adoption of the IDP/Budget/PMS Process Plan	Portfolio Committees, EXCO & Council	Aug 2024	Meetings
	Tabling of the Draft IDP/Budget/PMS Process Plan for approval with schedule for Public Meetings to Council	Council Meeting	Mayor and Municipal Manager	31 Aug 2024	Meetings
	Publication of the Final IDP/Budget/PMS Process Plan	Publish notice on local newspaper	IDP/PMS Manager	06 Sep 2024	Public Notice
	Compilation and submission of Draft Annual Report, Annual Performance Report and Annual Financial Statements	Desktop	Municipal Manager, Senior Management, Extended Management, Audit Committee, EXCO, MPAC, Council	31 Aug 2024	Desktop and Meetings

Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools
	Consultative Meetings	<b>Consultative meetings</b>	<b>All stakeholders</b>		
		District Planning and Performance Forum	All stakeholders	06 Aug 2024	Meetings
		District IGR	All stakeholders	14 Aug 2024	Meetings
	MECs Assessment of IDP	Assessment of the 2024/2025 IDP	COGHSTA	July - Aug 2024	Desktop and Meetings
Analysis	IDP Context and Process	Desktop	IDP Managers	Sept 2024	Office work (Desktop)
	Status quo analysis	Identification of gaps, stakeholder registration and information gathering	IDP/PMS Manager	Sept 2024	Office work (Desktop)
		IDP and Budget consultation meetings preparation	Senior and Extended Management, All Councillors	02 Nov 2024	Desktop and Meetings
		Needs analysis sessions with communities at wards.	IDP/PMS Manager, Budget and Reporting Manager, Offices of the Speaker and Mayor, Senior Management, Communities and sector departments	11 – 22 Nov 2024	Meetings
		Compilation of a consolidated community needs/issues report which will be used to inform the municipal situational analysis	IDP/PMS Manager	Nov 2024	Desktop
	Cluster collaboration and analysis (Key Performance Areas)	<b>Consultative meetings</b>	<b>Internal Heads of Departments</b>		
		Basic Services and Infrastructure	Director with sector stakeholders	Oct 2024	Meetings
		Community Development Services	Director with sector stakeholders	Oct 2024	Meetings
		Economic Development Services	Director with sector stakeholders	Oct 2024	Meetings

Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools	
		Financial Viability	Director with sector stakeholders	Oct 2024	Meetings	
		Governance	Municipal Manager with sector stakeholders	Oct 2024	Meetings	
		Institutional Transformation and Development	Director with sector stakeholders	Oct 2024	Meetings	
	Review and costing of municipal rates and tariffs	Desktop	Budget and Reporting Manager, Revenue Manager, CFO	11 Oct 2024	Desktop and Meetings	
	First draft Budget & Policies	Desktop	Budget and Reporting Manager, CFO	25 Oct 2024	Desktop and Meetings	
	Submit Quarterly Report on implementation of budget and financial state of affairs to Council	Desktop	CFO	31 Oct 2024	Desktop and Meetings	
	Assessment of the previous IDP/Budget performance, level of development, backlogs & disaster	Review previous year's processes, what worked well, what didn't, where to improve and issues to address for legislative compliance and completion of the Budget Evaluation Checklist (BEC); Human resources challenges & gaps.	IDP/PMS Manager and Budget and Reporting Manager, Senior Management, IDP/Budget Steering Committee	Oct 2024	Desktop and Meetings	
	Quarterly Performance Review for 1 <sup>st</sup> Quarter of 2024/2025	Desktop	Senior Management	Oct 2024	Desktop and Meetings	
	Consultative Meetings	<b>Consultative meetings</b>				<b>Meetings</b>
		Joe Morolong IDP Representative Forum	All stakeholders		05 Nov 2024	Meetings
District IGR		All stakeholders		12 Nov 2024	Meetings	
District Planning and Performance Forum		All stakeholders		14 Nov 2024	Meetings	



Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools	
Programmes & Strategies	2024/2025 Mid-year Budget and Performance Review and 2 <sup>nd</sup> Quarter Performance Review	Desktop	IDP/PMS Manager and Budget and Reporting Manager, Senior Management, IDP/Budget Steering Committee, EXCO, Council	Jan 2025	Desktop and Meetings	
	Mid-year Budget and Performance (Section 72) engagements	Provincial Treasury Visit	Budget and Reporting Manager, Senior Management, IDP/Budget Steering Committee	19 Feb 2025		
Strategies	Review/development of strategic priorities & objectives;  Review/confirmation of municipal Vision & Mission;  Alignment of LMs' priorities with those of DM.	Strategic Planning Sessions for all internal departments	IDP/PMS Manager and Budget and Reporting Manager, Senior Management, IDP/Budget Steering Committee, EXCO, Council	Nov 2024 – Jan 2025	Strategic Planning Sessions	
	Policy reviews	Review budget related policies e.g., Tariff; Credit & Debtors control management, Rates, Indigent.	Senior Management	Dec 2024 – Feb 2025		
	Cluster collaboration and Strategy formulation (Key Performance Areas)	<b>Consultative meetings</b>	<b>District Heads of Departments</b>			
		Basic Services and Infrastructure	Director with sector stakeholders	Jan 2025	Meetings	
		Community Development Services	Director with sector stakeholders	Jan 2025	Meetings	
		Development and Planning	Director with sector stakeholders	Jan 2025	Meetings	
		Financial Viability	Director with sector stakeholders	Jan 2025	Meetings	
Governance	Municipal Manager with sector stakeholders	Jan 2025	Meetings			

Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools
		Institutional Transformation and Development	Director with sector stakeholders	Jan 2025	Meetings
	District Planning and IDP Representative Forum meetings (dealing with strategies and performance reporting)	<b>Consultative meetings</b>	<b>All stakeholders</b>		
		Joe Morolong IDP Representative Forum	All stakeholders	11 Feb 2025	Meetings
		District Planning and Performance Forum	All stakeholders	Feb 2025	Meetings
Projects	Review or identification of the projects in line with reviewed objectives and priorities, as well as reviewed/new sector plans	Departmental sessions to identify projects	IDP/PMS Manager and all Service delivery Departments or EXCO	Nov 2024 – Jan 2025	Departmental sessions
		Revision of financial strategies and of the 2024/2025 approved MTREF (operating and capital budget) for adjustments.	CFO	Nov 2024 – Jan 2025	
		Submit Demand Management Plans (Business Plans, including feasibility, and costing) to Budget and Treasury Office	Senior Management	Jan 2025	Demand Management Plans.
		Presentation of municipal priorities to Sector Departments and JMLM projects by sector departments	District IGR	All stakeholders	Feb 2025
Integration	Draft Municipal Plans	Consolidation & confirmation of programmes/projects from internal departments and stakeholders	Municipal Manager, CFO, & IDP/PMS Manager	Feb 2025	Meetings
		Prepare draft budget for the 2025/2026 financial year and the projections for the two outer years (MTREF).	Budget and Reporting Manager, Senior Management, IDP/Budget Steering Committee, EXCO, Council	Mar 2025	Desktop work
		Issue notice of Council meeting to consider proposed 2025/2026 IDP and Budget.	IDP/PMS Manager, Budget and Reporting Manager, Senior Management,	Mar 2025	Council sittings

Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools
		Tabling of draft 2025/2026 IDP and Budget to council.  The tabled documents are sent to prescribed organs of state.	IDP/Budget Steering Committee, EXCO, Council		
		Table Draft 2025/2026 IDP, Budget, SDBIP in Council	Mayor and Municipal Manager	Mar 2025	Council sittings
		Adoption of Draft IDP, Budget, SDBIP	Council	Mar 2025	Council sittings
		Consultations on the drafts (both IDP & Budgets) to various stakeholders	IDP/PMS Manager, Budget and Reporting Manager, Senior Management	April 2025	IDP /Budget consultation meetings
		2025/2026 Draft Budget Engagement with Provincial Treasury and other key Stakeholders	Provincial Treasury visit	16 Apr 2025	
	Quarterly Performance Review for 3 <sup>rd</sup> Quarter of 2024/2025	Desktop	Senior Management	April 2025	Desktop and Meetings
	Consultative meetings (dealing with integration and performance reporting)	Community Consultative meetings	All stakeholders	07 – 17 Apr 2025	Community Consultation Meetings
		District IDP Lekgotla	All stakeholders	Apr 2025	Meeting
		District IGR	All stakeholders	07 May 2025	Meetings
		Joe Morolong IDP Representative Forum	All stakeholders	08 May 2025	Meetings
District Planning and Performance Forum		All stakeholders	May 2025	Meetings	

Phases	Target/Activity	Approach	Role Players/Stakeholders	Time Frames	Mechanisms/ Tools
Approval	Final drafts to Political principals (structures)	<p>Political inputs on the final draft.</p> <p>Public comments and comments from other organs of state are taken into consideration and where necessary, amendments are made to the IDP/Budget.</p> <p>Draft Service Delivery and Budget Implementation Plans (SDBIP's) are compiled and submitted with Budget.</p>	IDP/Budget Steering Committee, Portfolio Committees, EXCO	April 2025	IDP/Budget Steering Committee, Portfolios and EXCO Meetings
	Final drafts to individual Councils for approval	Final Adoption of the 2025/2026 IDP, Budget, and SDBIP	Municipal Council	May 2025	Council sitting
Submission to prescribed institutions	Submit final IDP and Budget to prescribed institutions (Provincial and National Treasury, COGHSTA and SALGA) and make the IDP and Budget public.	<p>Printed and electronic copies of the IDP, Budget, and SDBIP to be submitted to prescribed institutions.</p> <p>Final 2025/2026 IDP, Budget, and SDBIP to be published in printed media and on municipal website. Copies will also be availed to libraries and Tribal offices in the municipal jurisdiction</p>	IDP/PMS Manager, Budget and Reporting Manager	June 2025 (within 10 days of adoption)	<p>Post, email, courier or hand delivery.</p> <p>Notices and publications to local newspaper and website</p>