



# BEAUFORT WEST MUNICIPALITY

## 5<sup>TH</sup> GENERATION

### IDP & BUDGET PROCESS PLAN

#### 2022-2027





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# **INTEGRATED DEVELOPMENT PLAN**

## **IDP & BUDGET**

## **PROCESS PLAN**

**2022 - 2027**

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

**Tabled to Council 31 August 2021**



## 1. INTRODUCTION

The IDP Process Plan is the first step / milestone of the newly elected Council that paves the way and articulates the progressive activities and processes which the municipality will embarked on in the drafting, adoption and review of its fifth generation Integrated Development Plan for the implementation period 2022 - 2027. The process plan enhances integration and alignment between the IDP and Budget, thereby ensuring the development of an IDP-based budget. It fulfils the role of a business plan or an operational framework for the IDP process outlining the manner in which the IDP process will be undertaken. The IDP Process Plan incorporates all municipal planning, budgeting, performance management, performance reporting and public and stakeholder engagement processes. The preparation of a Process Plan, which is in essence the IDP Process set out in writing, requires the adoption by Council. This plan has to include the following:

- ❖ *A programme specifying the time frames for the different planning steps;*
- ❖ *Appropriate mechanisms, processes and procedures for consultation and participation of local communities, organs of state, traditional authorities, and other role players in the IDP drafting process;*
- ❖ *An indication of the organisational arrangements for the IDP process;*
- ❖ *Binding plans and planning requirements, i.e. policy and legislation; and*
- ❖ *Mechanisms and procedures for vertical and horizontal alignment.*

The process creates its own dynamics since it encompasses the involvement of external role-players, therefore it requires accurate logistical planning and arrangements of engagement sessions to ensure that the process is implemented in accordance with the approved schedule. It is important to bear in mind that the end result of the IDP process is not the drafting of the IDP document, but the actual implementation of projects and programmes which will ultimately create a conducive environment wherein all people can prosper social and economically.

### **Geographic Area of the IDP**

The 5<sup>th</sup> Generation IDP for Beaufort West Municipal Area includes the following towns Beaufort West, Murraysburg, Merweville and Nelspoort.

The geographic size of the municipal area is approximately 16 330.10 square kilometers.

## 2. BACKGROUND: DEVELOPMENTAL LOCAL GOVERNMENT

The character of the current system of local government is informed by the Constitution of the Republic of South Africa, Act 108 of 1996 which defined five objects for local government and made provisions for all municipalities to strive for the realisation of these objectives within their financial and administrative capacity.

- ❖ *The objects of local government, as per Section 152(1), of the Constitution are;*
- ❖ *to provide democratic and accountable government for local communities;*
- ❖ *ensure the provision of services to communities in a sustainable manner;*
- ❖ *promote social and economic development;*
- ❖ *promote a safe and healthy environment; and*



- ❖ *encourage the involvement of communities and community organisations in the matters of local government.*

Importantly, the White Paper on Local Government (1998) clarified what the developmental vision for local government should mean in practice. Essentially, the White Paper indicates that developmental local government means two things: a new approach to doing things and a set of new tools which local government can use to build this approach. The White Paper proposes that municipalities must focus their energies on a clear set of developmental outcomes that will meaningfully address the impact of apartheid on human settlements. These outcomes are;

- ❖ *provision of household infrastructure and services;*
- ❖ *creation of livable and integrated cities, towns and rural areas;*
- ❖ *local economic development; and*
- ❖ *community empowerment and redistribution.*

In order to orientate itself with these developmental outcomes, local government is constitutionally required to structure and manage its administration, planning and budgeting processes differently. The White Paper proposed some of the new administrative systems that municipalities needed to adopt to build a developmental approach. These systems are the pillars which concretely support a developmental orientation and are enshrined in the Municipal Systems Act. These are:

- ❖ *integrated development planning;*
- ❖ *performance measurement and management; and*
- ❖ *structures and systems to enable active involvement of citizens and communities in the affairs of municipalities.*
- ❖ *municipalities.*

### 3. INTEGRATED DEVELOPMENT PLANNING

The Municipal Systems Act, Act 32 of 2000 obligates all municipalities to undertake a process of preparing and implementing IDPs. According to Section 25 (1) of the MSA;

***Each municipal council must, within a prescribed period after the start of its elected term, adopt a single, all-inclusive and strategic plan for the development of the municipality which;***

- Links integrates and coordinates plans and takes into account proposals for the development of the municipality;*
- Aligns the resources and capacity of the municipality with the implementation of the plan*
- Complies with the provisions of this Chapter; and*
- Is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation.*



## 3.1 IDP CONTENT

In terms of the core components of integrated development plans, Chapter 5 and Section 26) of the Municipal Systems Act (2000) indicates that:

***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 and 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***

- (1) *A municipality's integrated development plan must at least identify;*
  - (a) *the institutional framework, which must include an organogram, required for-*
    - (i) *the implementation of the integrated development plan; and*
    - (ii) *addressing the municipality's internal transformation needs, as informed by the strategies and programmes set out in the integrated development plan;*
  - (b) *any investment initiatives in the municipality;*
  - (c) *any development initiatives in the municipality, including infrastructure, physical, social, economic and institutional development;*
  - (d) *all known projects, plans and programmes to be implemented within the municipality by any organ Of state; and*
  - (e) *the key performance indicators set by the municipality.*
- (2) *An integrated development plan may;*
  - (a) *have attached to it maps, statistics and other appropriate documents; or*
  - (b) *refer to maps, statistics and other appropriate documents that are not attached, provided they are open for public inspection at the Offices of the municipality in question.*
- (3) *A financial plan reflected in a municipality's integrated development plan must at least-*

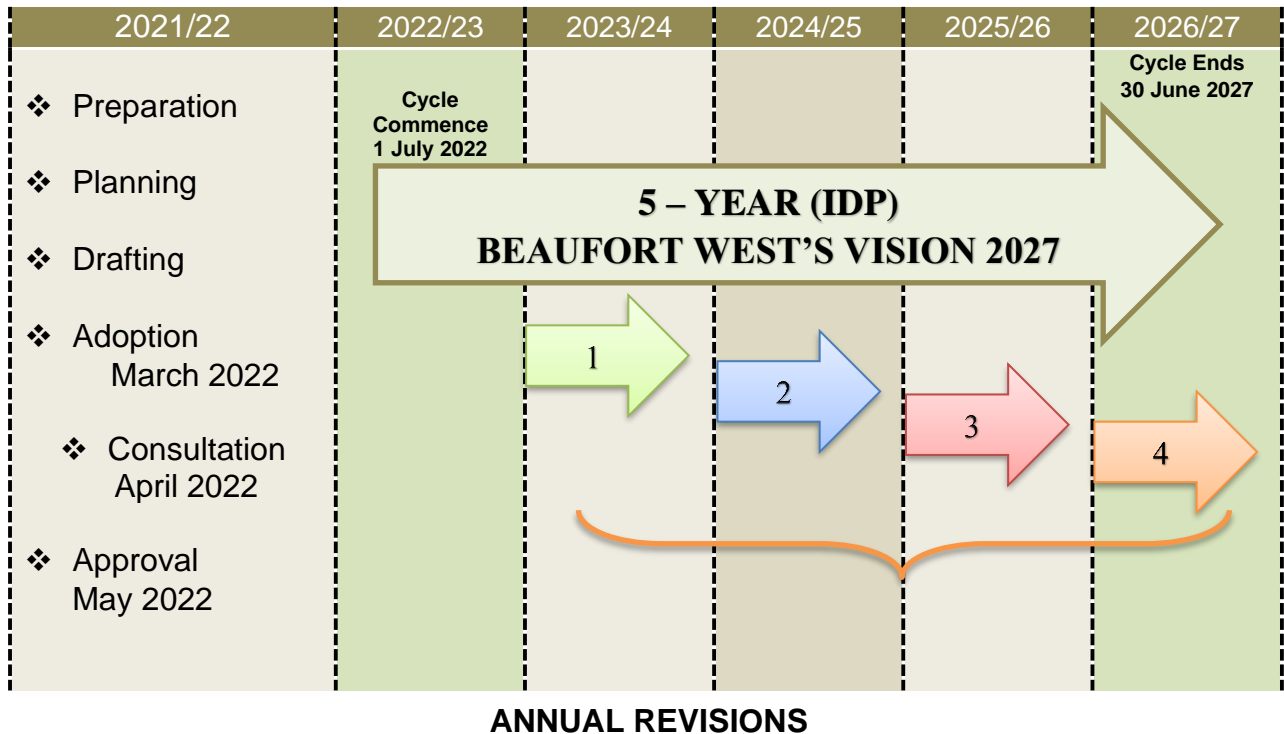


- (a) include the budget projection required by section 26(h) of the Act;*
  - (b) indicate the financial resources that are available for capital project developments and operational expenditure; and*
  - (c) include a financial strategy that defines sound financial management and expenditure control, as well as ways and means of increasing revenues and external funding for the municipality and its development priorities and objectives, which strategy may address the following:*
    - (i) Revenue raising strategies;*
    - (ii) asset management strategies;*
    - (iii) financial management strategies;*
    - (iv) capital financing strategies;*
    - (v) operational financing strategies; and*
    - (vi) strategies that would enhance cost-effectiveness.*
- (4) A spatial development framework reflected in a municipality's integrated development plan must-*
- (a) give effect to the principles contained in Chapter 1 of the Development Facilitation Act, 1995 (Act No. 67 of 1995);*
  - (b) set out objectives that reflect the desired spatial form of the municipality;*
  - (c) contain strategies and policies regarding the manner in which to achieve the objectives referred to in paragraph (b), which strategies and policies must-*
    - (i) indicate desired patterns of land use within the municipality;*
    - (ii) address the spatial reconstruction of the municipality; and*
    - (iii) provide strategic guidance in respect of the location and nature of development within the municipality;*
  - (d) set out basic guidelines for a land use management system in the municipality;*
  - (e) set out a capital investment framework for the municipality's development programs;*
  - (f) contain a strategic assessment of the environmental impact of the spatial development framework;*
  - (g) identify programs and projects for the development of land within the municipality;*
  - (h) be aligned with the spatial development frameworks reflected in the integrated development plans of neighbouring municipalities; and*
  - (j) 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.*



Integrated Development Planning is an elaborate and collaborative planning process which produces a strategic plan designed to guide municipalities and their entities to systematically eradicate service delivery backlogs; encourage socio-economic development; preserve and conserve the natural environment; address spatial disparities of development and deliver on the agreed priorities which are translated into projects with clearly defined outputs and targets within a five year planning cycle.

### 3.1.1 FIVE YEAR IDP CYCLE







### 3.2 PHASES OF IDP DRAFTING AND ANNUAL REVIEW PROCESS

The table below summarises the important activities and deliverables to be considered during the phases of the process of drafting and annual review of the IDP.

ACTIVITY	ACTION	DIRECTORATE
<b>PREPARATION</b>		
Ward Committees	❖ Establishment of Ward Committees. Elections will take place from December 2021 to January 2022.	Corporate Services
<b>ANALYSIS</b>		
External Analysis	❖ Review Sector Plans and priorities implementation of sector plan recommendations	All
	❖ Review Spatial Development Framework	Planning & Integrated
	❖ Socio Economic Analysis /	Corporate Services
	❖ Community Satisfaction Surveys	Corporate Services
Internal Analysis	❖ Community Needs Analysis / Input	Corporate Services
	❖ Review Long Term Financial Plan	Financial Services
	❖ Developed Organisational SWOT Analysis / Identify Opportunities and Critical Challenges	Municipal Manager
	❖ Third generation IDP Needs Analysis	Corporate Services
	❖ Review of Area Development Plans	Corporate Services
Internal Analysis	❖ Developed Ward Operational Plans	Corporate Services
	❖ Review minimum service levels / Standards	All
	<b>STRATEGY</b>	
Organisational Strategy Review	❖ Review third generation organisational strategy, amend, draft and adopt new strategy. Council and Management discuss strategic issues such as vision and mission, future directions, strategic goals and objectives, key performance indicators and targets for each strategic objective.	Executive Management Council
Strategic Planning Session	❖ Council and Management considered external and internal analysis and strategies around 5-year development priorities and operational strategies (programmes, projects, activities and actions)	Executive Management Council
<b>PROJECTS</b>		
Project and Programme Identification	❖ Management consider external and internal needs analysis and outcomes of Strategic Planning Session and identify projects and develop project business plans.	Executive Management
	❖ <b>Mandatory Projects</b> - Upgrade and Development of New Infrastructure Projects directly linked to basic service delivery (Water / Electricity / Sanitation)	Infrastructure Services
	❖ <b>Community Mandated Projects</b> – Projects aimed at socio and economic upliftment of communities These projects will be identified by communities and prioritised by Ward Committees.	
<b>INTEGRATION</b>		
Intergovernmental Alignment and Public Private Partnership Contribution	❖ Align municipal strategy with National, Provincial and District Municipality development policies and planning instruments. <b>(Horizontal and Vertical Alignment)</b>	Corporate Services
	❖ Participate in Provincial IDP INDABA and Joint Planning Forums.	All Directorates
	❖ Consider, Support and Incorporate Service Delivery and Development Interventions of other government and private sector counterparts in IDP.	Corporate Services
<b>APPROVAL</b>		
Tabling and Adoption of Draft IDP and Budget	❖ Finalise, table and adopt draft IDP ❖ Finalise, table and adopt draft annual budget	Office of the Municipal Manager Corporate Services Financial Services Council



ACTIVITY	ACTION	DIRECTORATE
Public and Stakeholder Consultation	<ul style="list-style-type: none"> <li>❖ Make public the draft IDP and draft annual budget for comments and submissions.</li> <li>❖ 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.</li> <li>❖ Consult the Central Karoo District Municipality on the draft IDP.</li> </ul>	Office of the Municipal Manager Corporate Services Financial Services Council
Tabling and Approval of IDP and Budget	<ul style="list-style-type: none"> <li>❖ Council approves the final IDP and final annual budget</li> </ul>	Office of the Municipal Manager Corporate Services Financial Services Council

### 3.2.1 STATUS OF SPATIAL DEVELOPMENT FRAMEWORK (SDF) REVISION/COMPILATION PROCESS

**LEGAL STATUS OF THE SDF:** Within the limitations of a Spatial Development Framework (SDF) as laid down by the Local Government Municipal Systems Act, 2000 (Act 32 of 2000) i.e. that it should be a guiding and informing document and does not confer real rights on land, it is intended that the SDF should be a binding document endorsed by the Municipal Council. The SDF must be approved by Council in terms of the MSA, and as a sector plan of the IDP in accordance with Section 20(2) of the Spatial Planning and Land Use Management Act, 2013 (Act 16 of 2013) (SPLUMA) which states that;

*“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”*

This endorsement will assist with the processing of development applications, demonstrating compliance with different sectoral policies and motivating project funding and budgets. The SDF links the development objectives taken from the Integrated Development Plan (IDP) and the Budget of a particular Municipality. Therefore, the SDF becomes the spatial presentation of the IDP objectives that guide projects funded through the budget of the Municipality.

What is clear from the above is that the municipal SDF is part of the IDP, hence the process to be followed in the drafting, adoption and amendment of a municipal SDF is the same process used for the drafting, adoption and amendment of the municipal IDP as set out in the MSA and its regulations.

**STATUS OF SDF:**

The Beaufort West Municipality is embarking on the compilation of its Spatial Development Framework (SDF) that is to be aligned to the requirements as set out in the Spatial Planning and Land Use Management Act, 2013 (Act 16 of 2013) (‘SPLUMA’), the Western Cape Land Use Planning Act, 2014 (Act 3 of 2014) (‘LUPA’) and the Beaufort West Municipal Land Use Planning Bylaw.

The Beaufort West Municipality commenced with the Compilation Process of a new MSDF during July 2021 and is envisaged that a Draft Spatial Development Framework will be adopted with the 2022/2027 Integrated Development Plan. The current MSDF was approved during the 2014/15 Financial Year on 20 May 2014 and adopted by Council with the 2017/2022 Integrated Development Plan as core component. The aforementioned mean that the newly elected council in its planning



process will have to adopt the Draft MSDF during March 2022 or May 2022, in the event that the Draft will not be available before end of Marh 2022.

It is further envisaged that the final MSDF will be tabled to Council for consideration before the end of 2022.

The Integovernmental Steering Committee has been established during July 2021 and was the first meeting held on the 16 August 2022. Council's intention to compile a new MSDF was also published in the Local Newspaper (The Courier) and in the Provincial Government Gazette as well as on Council's website and notice boards.

Attached as **Annexure A** is the Beaufort West MSDF compilation Project Plan (2021-2022).

### 3.2.1.1 CONTENT OF THE SPATIAL DEVELOPMENT FRAMEWORK (SDF)

Section 21. A of SPLUMA reflects on the content of the SDF and states that the SDF must;

- (a) *give effect to the development principles and applicable norms and standards set out in Chapter 2;*
- (b) *include a written and spatial representation of a five year spatial development plan for the spatial form of the municipality;*
- (c) *include a longer term spatial development vision statement for the municipal area which indicates a desired spatial growth and development pattern for the next 10 to 20 years;*
- (d) *identify current and future significant structuring and restructuring elements of the spatial form of the municipality, including development corridors, activity spines and economic nodes where public and private investment will be prioritised and facilitated;*
- (e) *include population growth estimates for the next five years;*
- (f) *include estimates of the demand for housing units across different socio-economic categories and the planned location and density of future housing developments;*
- (g) *include estimates of economic activity and employment trends and locations in the municipal area for the next five years;*
- (h) *identify, quantify and provide location requirements of engineering infrastructure and services provision for existing and future development needs for the next five years;*
- (i) *identify the designated areas where a national or provincial inclusionary housing policy may be applicable;*
- (j) *include a strategic assessment of the environmental pressures and opportunities within the municipal area, including the spatial location of environmental sensitivities, high potential agricultural land and coastal access strips, where applicable;*
- (k) *identify the designation of areas in the municipality where incremental upgrading approaches to development and regulation will be applicable;*



- (l) identify the designation of areas in which—
- (i) more detailed local plans must be developed; and
  - (ii) shortened land use development procedures may be applicable and land use schemes may be so amended;
- (m) provide the spatial expression of the coordination, alignment and integration of sectoral policies of all municipal departments;
- (n) determine a capital expenditure framework for the municipality's development programmes, depicted spatially;
- (o) determine the purpose, desired impact and structure of the land use management scheme to apply in that municipal area; and (p) include an implementation plan comprising of;
- (i) sectoral requirements, including budgets and resources for implementation;
  - (ii) necessary amendments to a land use scheme;
  - (iii) specification of institutional arrangements necessary for implementation;
  - (iv) specification of implementation targets, including dates and monitoring indicators; and
  - (v) specification, where necessary, of any arrangements for partnerships in the implementation process.

### 3.3 ANNUAL REVISION OF THE IDP

#### **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.

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 challenges. 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.*

### 3.3.1 WHAT THE REVIEW IS NOT

It is important to note that the Review is not a replacement or amendment of the 5 year IDP. The Review is not meant to interfere with the 5-year strategic orientation of the municipality and development horizon set in the mother document. Hence it is of absolute necessity to accurately plan and identify all development and services delivery needs and prospects to be pursued over the 5-year implementation cycle. Throughout the 5-year cycle any version of the IDP Review should always be read in conjunction with the approved 5-year IDP document.

### 3.4 LEGAL FRAMEWORK: IDP PROCESS PLAN

In order to ensure certain minimum quality standards of the IDP process and a proper coordination between and within the spheres of government, the preparation of the planning process is regulated by the Municipal Systems Act, No 32 of 2000. Section 28 of the Systems Act stipulates that;

- ❖ *Each Municipal Council must adopt a process set out in writing to guide the planning, drafting, adoption and review of the IDP.*
- ❖ *The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, consult the local community before adopting the process.*
- ❖ *A municipality must give notice to the local community of particulars of the process it intends to follow.*

## 4. ANNUAL BUDGET

The Budget and the IDP are inextricably linked to one another. Therefore it is important that the Budget and IDP processes be coordinated in a manner that will ensure that the IDP and budget related policies and the final budget are mutually consistent and credible. Credibility refers to the municipality's ability and capacity to spend and deliver services in accordance with its approved budget. The Budget processes has been formalised through the promulgation of the Municipal Finance Management Act (2004). Chapter 4 and Section 21 (1) of the Municipal Finance Management Act (MFMA) indicates that:

***The Mayor of a municipality must;***



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-  
The integrated development plan in terms of section 34 of the Municipal Systems 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).*

## 5. PUBLIC PARTICIPATION AND STAKEHOLDER ENGAGEMENT

Community Participation and stakeholder involvement in the IDP and Budget Planning Processes have been formalised and is coordinated in a structured manner. The Municipality recognises and acknowledges existing organised community structures that work towards the improvement and development of communities and will engage with such structures in the process of drafting its IDP and Budget. The Municipality will also directly consult and engage with residents on a large scale by means of the following;

- ❖ *Public Meetings / IDP and Budget Roadshows*
- ❖ *Mayoral Imbizo's.*
- ❖ *Ward Councillor Report-Back Meetings*

Other forms of consultations and engagement will be facilitated by means of the following;

- ❖ *Radio Talk Shows and Announcements*
- ❖ *Pamphlets and Posters*
- ❖ *Submission of public representations, inputs and requests*

### 5.1 WARD COMMITTEES

The role of the Ward Committees with respect to the IDP and Budget is to;

- ❖ *Assist the ward councillor in identifying service delivery challenges and development needs.*
- ❖ *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 and assist with the mobilisation of residents to participate in municipal consultation processes around planning and budgeting.*
- ❖ *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/area plan that offers suggestions on how to improve service delivery in the particular ward.*
- ❖ *Scrutinise ward / community needs analysis and prioritise projects and programmes for implementation (**Community Mandated Projects**)*
- ❖ *Monitor the implementation process concerning its area.*

## 5.2 BEAUFORT WEST IDP FORUM

The Beaufort West IDP Forum needs to be established which comprises out of various sectors and ward committee representation in Beaufort West. The Executive Mayor and the Municipal Manager are responsible for facilitating the IDP Forum meetings.

## 5.3 INTER-GOVERNMENTAL ALIGNMENT

Alignment is the mechanism 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 the Municipality in achieving its developmental objectives.

The desired outcome of inter-governmental alignment include –

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

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

## 6. ROLES AND RESPONSIBILITIES

One of the prerequisites of a well organised IDP process is for all role players to be fully aware of their own as well as other role player’s responsibilities. This section deals with the roles which the municipality has to play in the IDP and Budget processes in relation to the roles which external role players are expected to play.

### 6.1 ROLES AND RESPONSIBILITIES WITHIN THE MUNICIPALITY

ROLE PLAYERS	ROLES AND RESPONSIBILITIES
COUNCIL	<ul style="list-style-type: none"> <li>❖ Approve and adopt the process and framework plans as well as IDP and budget</li> <li>❖ Monitor the implementation and approve any amendments of the plan when necessary.</li> </ul>
EXECUTIVE MAYOR AND MAYORAL COMMITTEE	<ul style="list-style-type: none"> <li>❖ Consider the IDP and Budget timetable and Process Plan and submit to Council for approval. The Mayor must at least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for the preparation, tabling and approval of the annual budget, the annual review of the IDP and budget-related policies, the tabling and adoption</li> </ul>



	<p>of any amendments to the IDP and budget-related policies and consultative processes. (MFMA section 21(1)(b))</p> <ul style="list-style-type: none"> <li>❖ Overall management, coordination and monitoring of the IDP process.</li> <li>❖ Assign and delegate responsibilities in this regard to the Municipal Manager.</li> <li>❖ Submit the draft IDP to Council for approval.</li> <li>❖ Submit final IDP and Budget to Council for adoption.</li> <li>❖ Provide political guidance in IDP and Budget (in terms of section 53(a) of the MFMA).</li> <li>❖ Co-ordinate plans and Timetables for the Budget.</li> <li>❖ Exercise close oversight on Budget Preparation Process.</li> </ul>
<b>SPEAKER</b>	<ul style="list-style-type: none"> <li>❖ Overall monitoring of the public participation process.</li> <li>❖ Exercise oversight of the ward committee system.</li> </ul>
<b>WARD COUNCILLORS / WARD COMMITTEES</b>	<ul style="list-style-type: none"> <li>❖ Form a link between the Municipality and residents.</li> <li>❖ Link the IDP process to their respective Wards.</li> <li>❖ Assist in the organising of public consultation and participation.</li> <li>❖ Monitor the implementation of the IDP with respect to their particular wards</li> <li>❖ Encourage residents to take part in the IDP process.</li> </ul>
<b>ROLE PLAYERS</b>	<b>ROLES AND RESPONSIBILITIES</b>
<b>MUNICIPAL MANAGER</b>	<ul style="list-style-type: none"> <li>❖ Managing and coordinate the entire IDP process as assigned by the Executive Mayor.</li> <li>❖ Chair the IDP Steering Committee Meetings.</li> <li>❖ Fulfil the duties of Accounting Officer as set out in Sections 68 and 69 of the MFMA.</li> </ul>
<b>CHIEF FINANCIAL OFFICER</b>	<ul style="list-style-type: none"> <li>❖ The CFO must perform such budgeting duties as delegated by the accounting officer. (MFMA section 81(e))</li> </ul>
<b>DIRECTORS / HEAD OF DEPARTMENTS</b>	<ul style="list-style-type: none"> <li>❖ Provide technical, sector and financial information for analysis for determining priority issues.</li> <li>❖ Provide technical expertise in consideration and finalisation of strategies and identification of projects.</li> <li>❖ Provide departmental, operational and capital budgetary information.</li> <li>❖ Preparation of project proposals, integration of projects and sector programmes.</li> </ul>
<b>IDP COORDINATOR</b>	<ul style="list-style-type: none"> <li>❖ Prepare IDP process plan and monitor the timeously implementation thereof.</li> <li>❖ Day to day management and coordination of the IDP process.</li> <li>❖ Ensure stakeholder engagement in IDP process by organising meetings for engagement.</li> <li>❖ Ensure that the IDP process is participatory and that planning is ward-based oriented.</li> <li>❖ Respond to public and MEC comments on Draft IDP.</li> <li>❖ Compilation of comprehensive, neat and presentable IDP document that complies with all legislator requirements.</li> <li>❖ Amend the IDP document in accordance with the comments of the MEC.</li> </ul>
<b>BUDGET OFFICE</b>	<ul style="list-style-type: none"> <li>❖ Responsible for the Management, planning and compilation of Budget.</li> <li>❖ Day to day management and coordination of the Budget process.</li> </ul>
<b>IDP-STEERING COMMITTEE</b>	<ul style="list-style-type: none"> <li>❖ Refinement and Quality check of IDP document to ensure compliance with legislation.</li> <li>❖ Consist of Municipal Manager, Senior Management/Directors, IDP Manager, and Speaker.</li> </ul>
<b>BUDGET-STEERING COMMITTEE</b>	<ul style="list-style-type: none"> <li>❖ To provide technical assistance to the mayor in discharging the responsibilities set out in Section 53 of the MFMA.</li> <li>❖ Consist of portfolio Councillor for Financial matters, the Municipal Manager, the Chief Financial Officer, Directors and Head of Departments to give technical advice if necessary.</li> </ul>





## 6.2 DISTRIBUTION OF ROLES AND RESPONSIBILITIES BETWEEN THE MUNICIPALITY AND EXTERNAL ROLE PLAYERS

ROLE PLAYERS	ROLES AND RESPONSIBILITIES
BEAUFORT WEST MUNICIPALITY	<ul style="list-style-type: none"> <li>❖ Prepare and adopt the IDP.</li> <li>❖ Undertake the overall planning, management and coordination of the IDP process.</li> <li>❖ Consider comments of the MEC on the IDP and adjust the IDP if necessary.</li> <li>❖ Ensure linkage between the Budget and IDP.</li> <li>❖ Ensure that the annual business plans, budget and performance management system are linked to and based on the IDP.</li> </ul>
LOCAL RESIDENTS, AND STAKEHOLDERS	<ul style="list-style-type: none"> <li>❖ Represents interest and contributes knowledge and ideas in the IDP process by participating in and through the ward committee structures.</li> <li>❖ Keep constituencies informed on IDP activities and outcomes.</li> <li>❖ Participate in IDP service delivery needs analysis.</li> <li>❖ Submit written representation and comment on draft IDP and Draft annual budgets</li> </ul>
CENTRAL KAROO DISTRICT MUNICIPALITY	<ul style="list-style-type: none"> <li>❖ Ensure alignment of the IDP between the municipality and the district municipality (Integrated District and Local Planning).</li> <li>❖ Preparation of joint strategy workshops between municipality, provincial and national government.</li> <li>❖ Facilitate engagements and planning sessions on district wide development and service delivery matters.</li> <li>❖ Coordinate District Public Participation and Integrated Development Planning engagements to share information and best practices.</li> </ul>
PROVINCIAL GOVERNMENT  IDP DIRECTORATE  &  PROVINCIAL TREASURY	<ul style="list-style-type: none"> <li>❖ Ensure horizontal alignment of the IDP between the municipality and the District municipality.</li> <li>❖ Ensuring vertical and sector alignment between provincial sector departments/ provincial strategic plans and the IDP process at local/district level.</li> <li>❖ Facilitate IDP INDABA and Joint Planning Interventions.</li> <li>❖ Guiding the provincial sector departments' participation in and their required contribution to the municipal IDP process; and</li> <li>❖ Guiding them in assessing draft IDP's and aligning their sector programmes and budgets with the IDP's.</li> <li>❖ Efficient financial management of Provincial IDP grants.</li> <li>❖ Monitor the IDP progress.</li> <li>❖ Assist municipalities in compiling the IDP.</li> <li>❖ Coordinate and manage the MEC's assessment of the IDP.</li> <li>❖ Provide IDP related training where required.</li> <li>❖ Share best practices in relation to IDP document content, strategic alignment and spatial mapping.</li> <li>❖ Provincial Treasury must provide views and comments on the draft budget and any budget-related policies and documentation for consideration by council when tabling the budget.</li> <li>❖ Conduct Medium Term Revenue and Expenditure Framework (MTREF) budget and IDP assessment.</li> </ul>
INTERNAL SECTOR DEPARTMENTS	<ul style="list-style-type: none"> <li>❖ Contribute sector expertise and knowledge.</li> <li>❖ Provide sector plans and programmes and projects for inclusion in the IDP.</li> <li>❖ Participate in Ward / Area Development Planning Processes.</li> </ul>
NATIONAL GOVERNMENT	<ul style="list-style-type: none"> <li>❖ National Treasury issues guidelines on the manner in which municipal councils should process their annual budgets, including guidelines on the formation of a committee of the council to consider the budget (Section 23(3) of the MFMA).</li> </ul>



## 7. PRINCIPLES GUIDING DEVELOPMENT

The following principles as encapsulated in the National Environmental Management Act 107 of 1998 should form the basis for planning and development:

- ❖ Environmental management must place people and their needs at the forefront of its concern, and serve their physical, psychological, developmental, cultural and social interests equitably.
- ❖ Development must be socially, environmentally and economically sustainable. Sustainable development requires the consideration of all relevant factors including the following:
  - ❖ *that the disturbance of ecosystems and loss of biological diversity are avoided, or, where they cannot be altogether avoided, are minimised and remedied;*
  - ❖ *that pollution and degradation of the environment are avoided, or, where they cannot be altogether avoided, are minimised and remedied;*
  - ❖ *that the disturbance of landscapes and sites that constitute the nation's cultural heritage is avoided, or where it cannot be altogether avoided, is minimised and remedied;*
  - ❖ *that waste is avoided, or where it cannot be altogether avoided, minimised and reused or recycled where possible and otherwise disposed of in a responsible manner;*
  - ❖ *that the use and exploitation of non-renewable natural resources is responsible and equitable, and takes into account the consequences of the depletion of the resource;*
  - ❖ *that the development, use and exploitation of renewable resources and the ecosystems of which they are part do not exceed the level beyond which their integrity is jeopardised;*
  - ❖ *that a risk-averse and cautious approach is applied, which takes into account the limits of current knowledge about the consequences of decisions and actions; and*
  - ❖ *that negative impacts on the environment and on people's environmental rights be anticipated and prevented, and where they cannot be altogether prevented, are minimised and remedied.*

Environmental management must be integrated, acknowledging that all elements of the environment are linked and interrelated, and it must take into account the effects of decisions on all aspects of the environmental option.

- ❖ Environmental justice must be pursued.
- ❖ Equitable access to environmental resources, benefits and services to meet basic human needs and ensure human wellbeing must be pursued.
- ❖ The participation of all interested and affected parties in environmental governance must be promoted, and all people must have the opportunity to develop the understanding, skills and capacity necessary



for achieving equitable and effective participation, and participation by vulnerable and disadvantaged persons must be ensured.

- ❖ Decisions must take into account the interests, needs and values of all interested and affected parties, and this includes recognising all forms of knowledge, including traditional and ordinary knowledge.
- ❖ Community wellbeing and empowerment must be promoted through environmental education, the raising of environmental awareness, the sharing of knowledge and experience and other appropriate means.
- ❖ The social, economic and environmental impacts of activities, including disadvantages and benefits, must be considered, assessed and evaluated, and decisions must be appropriate in the light of such consideration and assessment.
- ❖ There must be intergovernmental coordination and harmonisation of policies, legislation and actions relating to the environment.
- ❖ Actual or potential conflicts of interest between organs of state should be resolved through conflict resolution procedures.
- ❖ Global and international responsibilities and deliberations relating to the environment must be discharged in the national interest.
- ❖ The environment is held in public trust for the people, the beneficial use of environmental resources must serve the public interest and the environment must be protected as the people's common heritage.
- ❖ The vital role of women and youth in environmental management and development must be recognised and their full participation therein must be promoted.
- ❖ Sensitive, vulnerable, highly dynamic or stressed ecosystems, such as coastal shores, estuaries, wetlands, and similar systems require specific attention in management and planning procedures.
- ❖ Adherence to the Batho Pele principles.

## 7.1 SECTOR PLAN REVISION

The following sector plans should be drafted or reviewed before the tabling and adoption of the 2022-2027 five-year IDP. The development priorities, recommendations and critical challenges identified in sector plans must be incorporated in the five-year IDP.



- ❖ Spatial Development Framework
- ❖ Municipal Strategic Plan
- ❖ Water Services Development Plan
- ❖ Integrated Waste Management Plan
- ❖ Air Quality Management Plan
- ❖ Local Economic Development
- ❖ Workplace Skills Plan
- ❖ Electricity Master Plan
- ❖ Renewable Energy Plan
- ❖ Long Term Financial Management Plan
- ❖ Integrated Human Settlement Plan
- ❖ Disaster Management Plan
- ❖ Integrated Transport Management Plan
- ❖ Climate Change Adaptation and Mitigation Strategy
- ❖ Stormwater Master Plan
- ❖ Pavement Management System



## 8. IDP AND BUDGET PROCESS PLAN/ TIME-SCHEDULE

### FOR COMPILATION & APPROVAL OF THE 2022-2027 IDP & MEDIUM TERM EXPENDITURE FRAMEWORK

DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
<b>1. PREPARATION OF IDP AND BUDGET PROCESS PLAN</b>				
a) Table Draft 2022-2027 IDP and Budget time-schedule / process plan to Executive Management.	IDP Coordinator/Manager: Fin Admin	Quality check and to finalise draft Process Plan for 2022-2027	(MFMA) Section 21	Aug '21
b) Tabling of Draft 2022-2027 IDP/Budget Process Plan to Council for approval with schedule for IDP Public meetings.	Acting Mun. Manager/ IDP Coordinator	Approved 2022-2027 Process Plan	(MFMA) Section 21 (b)	Aug '21
c) Advertise 2022-2027 process plan and dates of IDP Public Meetings on website, local newspapers, municipal newsletter, Noticeboards. Forward Process Plan to DLG. Inform Ward Councillors Accordingly.	IDP Coordinator	Notification to public and Ward Councillors.	MSA Section 21, 28 (3)	Sept '21
<b>2. 4<sup>TH</sup> QUARTER CORPORATE PERFORMANCE REPORT</b>				
a) Prepare and Submit 2020/21 Fourth Quarter Corporate Performance Report to Executive Management for quality check and review.	Director Corporate	Finalise Fourth Quarter Corporate Performance Report for inclusion in Council Agenda	MPPMR - Section 13 (2) PMS Framework	Aug '21
b) Submit 2020/21 Fourth Quarter Performance Report to Oversight Committee	Mun. Manager Director Corporate	To provide oversight and in-year performance monitoring	Section 79 of Municipal Structures Act	Aug '21
c) Table 2020/21 Fourth Quarter Performance Report to Council.	Mun. Manager	Report on Councils Agenda	PMS Framework	Aug '21
d) Submit quarterly status report on the implementation of Performance Management to Performance Audit Committee	IDP Coordinator	PMS Status report on MPAC Agenda	MFMA S166 2(a)9v)	Aug '21
e) Place 2020/21 Fourth Quarter Corporate Performance Report on municipal website.	Budget Office/ Compl. & PMS Officer	Fourth Quarter Corporate Performance Report on website	MFMA Section 75 (2) MSA 21(b)	Sept '21



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
f) Submit 2020/21 Fourth Quarter Corporate Performance Report to National and Provincial Treasury	Budget Office/ Compl. &PMS Officer	Fourth Quarter Corporate Performance Report submitted	MBRR- Section 31	Sept '21
<b>3. EMPLOYEE PERFORMANCE MANAGEMENT</b>				
a) Drafting and signing of new performance contracts for Section 57 Managers for 2021/22 financial year.	Municipal Manager  Executive Mayor	To give effect to the Performance Management Framework And relevant legislation	To give effect to the Performance Management Framework And relevant legislation  MPPMR Section 13	Jul '21
b) Performance assessments of Section 57 Managers for 21/22.	Directors			Sep '21 - Oct '21
<b>4. PLANNING FOR THE 2022 - 2027 IDP</b>				
a) Municipal Manager submits draft 2021/22 SDBIP to the Executive Mayor for consideration, 14 days after approval of the budget	Acting Mun. Manager/ Compl. & PMS Officer	Approved 21/22 Top Layer SDBIP	MFMA Section 69(3)(a)	July '21
b) Executive Mayor approves 2021/22 SDBIP within 28 days after approval of budget	IDP Coordinator Mun. Manager	Approved 21/22 Top Layer SDBIP	MFMA Section 53(1)(c)(ii)(2)	July '21
c) Convene IDP Steering Committee Meeting	IDP/Budget Steering Committee	Final discussion / conceptualisation of IDP Public Participation Meetings	Internal Management Procedure	Sep '21
d) Review and or amend/update/develop new Municipal Spatial Development Framework.	Director: Infrastructure Services/IDP Coordinator	Status report of SDF Revision	MSA – 26 MPPMR – Section 4	Sep '21
e) Convene first Council meeting after municipal election	MM	Constitute Council and Council's Committees		Nov '21
f) Identification of mandatory projects prioritised for implementation for 22/23 and four outer years MTREF by Internal Sector Departments.	IDP Coordinator Directors	To inform public of planned mandatory projects for sustainable delivery of basic services and to include in 2022-2027 IDP	Internal Planning and Management Procedure	Nov '21



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
g) Review of Local Economic Development	MM/Director: Infrastructure Services/IDP Coordinator	Facilitate stakeholder involvement in LED Review process. Compile LED	Internal Planning and Management Strategy	Nov '21
h) Convene IDP Public Participation Meetings in all Wards	IDP Coordinator /Directors	Review Ward Needs in 21/22 IDP and get inputs for 5-year IDP.	MSA Section 17	Nov '21
<b>5. INITIATE THE 22/23 BUDGET PROCESS</b>				
a) Tabling of 1 <sup>st</sup> 21/22 Adjustment Budget to Council to incorporate Rollovers, Changes on SDBIP and KPI's as per adjustment budget.	CFO Budget Office/Compl. &PMS Officer	Council approve 2021/22 Adjustment budget and amended SDBIP (potential)	MFMA Section 28 MBRR - Regulation 23(5)	Nov/Dec '21
b) Finalise 2020/21 Annual Financial Statements.	CFO	Based on 20/21 AFS assess municipality's financial position, capacity to fund budget over 22/23 MTREF	MFMA - Section 126	Aug '21
c) Publication of approved adjustment budget on website and submit to National & Provincial Treasuries in both printed and electronic formats.	Budget Office Corporate Services	Approved Adjustment Budget & SDBIP being made available on official website and submission to NT and PT	MFMA Section 28(7) MSA 21(b) MBRR Section 26 & 27	Sept '21
d) Engage with Provincial Government regarding adjustments to projected allocations for next 3 years i.t.o the MTREF.	CFO Directors	Intergovernmental Budget Alignment	MSA Section 24	Nov '21
<b>6. 2020/21 ANNUAL REPORT / AUDIT READINESS</b>				
a) Gather performance information (POE'S) that substantiate actual performance reported on 20/21 Top level SDBIP and Management Scorecard.	CFO Budget Office/Compl. &PMS Officer & Directors	Prepare Corporate Audit File on Performance information for pre audit by internal audit.	Internal Management Procedure	July '21
b) Auditing of Performance Information on pre-determined objectives by internal audit. Pre - Audit.	Mun. Manager Directors	Pre Audit in preparation for external audit by the Auditor General	Internal Management Procedure	July '21
c) Submit unaudited 2020/21 Annual Report to Auditor-General as required by legislation.	Mun. Manager	Unaudited report includes the narrative Annual Performance Report Annual Financial Statements	MFMA - Chapter 12 - Section 126 MFMA Circular No.63	August '21
d) Auditing of draft 2020/21 Annual Report by Auditor-General.	Mun. Manager	Auditor-General's audit report on municipality's Annual Report	MFMA - Section 126 MFMA Circular No.63	Nov '21



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
<b>7. 1<sup>st</sup> QUARTER CORPORATE PERFORMANCE REPORT</b>				
a) Prepare and Submit 2021/22 First Quarter Corporate Performance Report to Executive Management.	Compl.&PMS Officer /Mun. Manager Budget Office	Finalise 1st Quarter Corporate Performance Report for inclusion on Council Agenda	MPPMR - Section 13 (2) PMS Framework	Oct '21
b) Submit 2021/22 First Quarter Performance Report to Oversight Committee	Mun. Manager	To provide oversight and in-year performance monitoring	Section 79 of Municipal Structures Act	Oct '21
c) Quarterly performance assessments: Section 56/57 managers.	Mun. Manager	To assess performance against targets	PMS Framework	Sep - Oct '21
d) Table 21/22 First Quarter Performance Report to Council.	Mun. Manager CFO	First Quarter Corporate Performance Report considered by Council	MPPMR Section 13 MFMA Section 52 (d)	Oct '21
e) Place first Quarter Performance Report on website and submit to PT and NT.	Compl. & PMS Officer Budget Office	First Quarter Corporate Performance Report published and submitted	MFMA Section 75 (2) MSA 21(b) / MBRR Sect. 31	Nov '21
f) Submit quarterly status report on the implementation of Performance Management to Performance Audit Committee	Internal Auditor	PMS Status report on PAC Agenda	MFMA Section 166 MPPMR Regulation 14	Nov '21
<b>8. MUNICIPAL STRATEGY REVIEW</b>				
a) Convene High level Strategic Planning Session to Review municipal high level overarching strategy and long and short term development objectives.	Mun. Manager Directors Council IDP Coordinator	Identify and discuss critical challenges projects / programmes for 5-year IDP in line with available funds on CRR. Discuss financial forecasts and possible tariff increases over 5-year period.	Internal Planning and Management Strategy	Nov '21
b) IDP and Budget Steering Committee meeting to consider recommendations emanating from strategic planning session.	IDP/ BS Committee	Consider allocation of total fixed amount of capital to be financed from CRR and tariff increased for 22/23 and outer four years	Internal Planning and Management Strategy	Nov '21
c) Forward previous financial year and 3 year capital budget and service delivery and development priorities to Directors.	Budget Office/ Directors	Identify ward based capital projects for 22/23 and four outer years MTREF	Internal Planning and Management Strategy	Nov '21
d) DCF Planning	MM and Directors	Strategic engagements with municipalities where district Mayors facilitate discussions at scheduled DCF meeting present on jobs, Safety and Dignity & Wellbeing using JDMA methodology		Nov '21





DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
e) IDP Indaba	IDP Coordinator, MM & Directors	Project and budget alignment and implementation of IDP projects between all three spheres of government using JDMA methodology.		Sept – October '21
f) Develop Area Development Plans for incorporation in 5-year IDP.	IDP Coordinator/P P Officials	Area Development Plan included in 2022/23 IDP	Internal Planning and Management Strategy	Dec '21 to Jan '22
g) Directors finalise and prioritise Directorates capital projects for 22/23 MTREF and four outer years.	Mun. Manager/Directors	Draft capital budget per directorate	Internal Planning and Management Strategy	Jan '22
h) Draft and table long/short term strategic plan to Council for approval and for incorporation in 5-year IDP	Municipal Manager/Council	Council approved long/short term Strategic Plan	Internal Planning and Management Strategy	Jan '22
<b>9. PREPARING THE 2022/23 MTREF BUDGET</b>				
a) Finalise salary budget for 2022/2023.	Expenditure CFO	Salary Budget	Internal Management Procedure	Jan '22
b) Directors submit directorates 5 year capital budget project priorities with cost to Budget Office to consolidate inputs.	Directors Budget Office	Compilation of first draft Capital Budget	Internal Management Procedure	Jan '22
c) Finalise preliminary projections on operating budget for 22/23	Budget Office	22/23 Operating Budget	Internal Management Procedure	Jan '22
d) Provide Tariff list structure to Departments for 22/23 Tariff inputs	Budget Office	Finalise 22/23 Tariff list structure	Internal Management Procedure	Jan '22
e) Budget Steering Committee Meeting to table and consider draft Capital Budget for 22/23 and four outer years MTREF.	BS Committee	22/23 and four outer year's Draft Capital Budget	Internal Management Procedure	Jan '22
f) BS Committee Meeting to table and consider draft Capital Budget for 22/23 MTREF and 21/22 2 <sup>nd</sup> Adjustment Budget.	BS Committee CFO Budget office	22/23 Draft Capital Budget and 21/22 2 <sup>nd</sup> Adjustment Budget	Internal Management Procedure	Jan '22
g) Finalise Budget related policies	CFO	Review all budget related policies	Internal Management Procedure	Feb '22
<b>10. FIRST TABLING OF 2020/21 ANNUAL REPORT</b>				
a) Table 2020/21 Annual Report to Council.	Municipal Manager	20/21 Annual Report Consider by Council.	MFMA - Section 127	Jan '22
b) Tabled 2020/21 Annual Report submitted to the Auditor General, Provincial Treasury & Dept. Local Government.	Corporate Services	Tabled 2020/21 Annual Report submitted	MFMA - 127 (5) (b)	Jan '22



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
c) Make public the - 2020/21 Annual Report, invite the public to submit representations in connection with the Annual Report.	Corporate Services	Summary of public representations	MFMA - Section 127 (5a)	Jan/Feb '22
<b>11. 2<sup>ND</sup> QUARTER / MID-YEAR CORPORATE PERFORMANCE</b>				
a) Prepare and Submit 2021/22 Second Quarter and Mid-Year Corporate Performance Report to Executive Management.	Compl.&PMS Officer Mun. Manager Budget Office	Finalise Second Quarter / Mid-Year Corporate Performance Report for inclusion on Council Agenda	MPPMR - Section 13 (2) PMS Framework	Jan '22
b) Submit 2021/22 Second Quarter Performance Report to Oversight Committee	Mun. Manager	To provide oversight and in-year performance monitoring	Section 79 of Municipal Structures Act	Jan '22
c) Table 2021/22 Second Quarter and Mid-Year Corporate Performance Report to Council.	Mun. Manager CFO	Second Quarter & Mid-year Corporate Performance Report Agenda	MPPMR Section 13 MFMA Section 52 (d) & 72	Jan '22
d) Place 2021/22 2nd Quarter & Mid-Year Performance Report on website submit to NT and PT.	IDP Coordinator Budget Office	2nd Quarter & Mid-Year Performance Report published and submitted	MFMA Section 52 & 72 MBRR 31 & 35	Jan/Feb '22
e) Publication of Mid-year Corporate Budget and Performance Assessment Report.	Budget Office	Publication of Mid-year assessment	MFMA Section 72 MBRR 34	Feb '22
f) Submit quarterly status report on the implementation of Performance Management to Performance Audit Committee	IDP Coordinator	Report on MPAC Agenda	MFMA Section 166 MPPMR Regulation 14	Feb '22
g) 2021/22 Mid-Year performance assessments of Section 57 managers	Mun. Manager Directors	To assess performance against targets	PMS Framework	Feb '22
<b>12. 2021/22 SECOND ADJUSTMENT BUDGET</b>				
a) Receive inputs on 2021/22 2 <sup>nd</sup> Adjustment Budget from Departments	Directors Budget office	Preparation for adjustment budget	MFMA Section 28 MBRR Section 23(1)	Dec '22
b) Finalise Capital and Operational budget projections for 2021/22.	Budget office	Preparation for adjustment budget	MFMA Section 28 MBRR Section 23(1)	Jan '22
c) Table 2021/22 Adjustment Budget to Council for approval. (Possible Amend IDP and Top Layer SDBIP).	CFO Budget office IDP Coordinator/C ompl.&PMS Officer	Table second 2021/22 Adjustment budget for approval	MFMA Sec. 28 & 54 (1) (c) MBRR - Regulation 23(1)	Feb'22
d) Publish 2021/22 Second Adjustment Budget on website and submit to Provincial and National Treasury.	Budget Office	Approved Adjustments Budget being made available on official website and submission to NT and PT	MFMA Section 28(7) MSA 21(b) MBRR Section 26 & 27	March '22



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
<b>13. FIRST DRAFT OF 2022-2027 IDP / BUDGET AND SDBIP</b>				
a) Review final tariffs and charges and determines tariffs to balance the budget and finalise income budget for 22/23.	CFO, BTO and Manager:Revenue	Finalise 2022/23 Income Budget	MFMA Section 17	Oct/Nov '21
b) Submits Draft IDP to Municipal Manager with proposed public participation programme.	IDP Coordinator	Review, Scrutinise, do quality check.	Internal Management Procedure	Feb '22
c) Table Draft 5-year IDP and Draft Capital Budget to Executive Management.	IDP Coordinator	Finalise Draft IDP and Capital Budget for referral to IDP & B Steering Committee	Internal Management Procedure	Feb '22
d) LGMTEC - Municipality receive inputs from National and Provincial Government and other bodies "Grant Allocations".	CFO Budget Office	Provincial Feedback Report Appropriate Grant Funding Allocations in Budget	DORA	Feb '22
e) Table Draft IDP, Budget and SDBIP to Steering Committee for final overview, inclusiveness and quality check.	Mun. Manager	Draft IDP, Capital and Operating Budget and SDBIP for 2022/23	MFMA No. 56 of 2003, MBRR Section 14 (2)	March '22
f) Workshop Draft 5-year IDP, Budget, SDBIP and proposed tariffs for 2022/23 with Council.	Mun. Manager	Workshop draft budget with full council	Internal Management Procedure	March '22
g) Municipal Manager presents final draft IDP, Budget and Budget related policies to the Mayor for perusal and tabling to Council.	Mun. Manager	Draft IDP and Budget on Council Agenda	MSA Section 30 (c) MFMA Section 21	March'22
h) Table Draft 5-year IDP, Budget, SDBIP, Budget related policies and proposed public participation programme to Council.	Mun. Manager CFO IDP Coordinator	Draft IDP and Budget	MFMA Section 22 and 23 MSA Reg 3 (4) (a-b)	March '22
i) Table Draft New Spatial Development Framework to Council for adoption and alignment with 5-year IDP.	Director:Infrastructure & IDP Coordinator.	Adopt Draft Spatial Development Framework and align IDP.	Spatial Planning Legislation	March' 22
<b>14. ADOPTION OF 20/21 ANNUAL REPORT</b>				
a) Oversight Committee Meeting to discuss 2020/21 Annual report.	Corporate Services	Oversight Committee Report on 2020/21 Annual Report	MFMA - Section 129	Feb '22
b) Council considers the annual report and adopts the 2020/21 Oversight report on Annual Report within two months after the annual report was tabled.	Mun. Manager	Oversight Report and Annual Report Adopted	MFMA Section 129	March '22
c) The municipal manager makes the oversight report public within seven days after adoption of the annual report.	Mun. Manager	Advertisement, oversight report	MFMA Section 129 (3)	April '22



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
d) Municipal manager submits annual report and oversight report to provincial government within seven days of adoption of the oversight report.	Corporate Services	Annual Report Submitted	MFMA Section 132 (1) & (2)	April '22
<b>15. PUBLICATION AND PUBLIC CONSULTATION PROCESS</b>				
a) Publication of Draft IDP and Budget for public comment and consultation.	Budget Office IDP Coordinator	Tabled Draft IDP and Budget available for public viewing, scrutiny and comment.	MFMA Section 22(a); MSA Section 21A	April '22
b) Submission of Draft IDP and tabled annual budget and draft SDBIP to National and Provincial Treasuries and Department of Local Government in both printed and electronic formats.	IDP Coordinator Budget Office	Draft IDP, Tabled annual budget + SDBIP submitted	MFMA Section 22(b) MBRR 15 (3) (b) & 15(1)	April '22
c) Consult Ward Committees on 5-year Draft IDP and Budget.	IDP Coordinator	Obtain input / comment from Ward Committees on Draft IDP and Budget	MFMA Section 22 & 23	April '22
d) Consult public on Draft IDP and Budget. Public Participation meetings in all wards.	Budget Office/IDP Coordinator	Inform and obtain public input/comment on draft IDP, Budget and tariffs.	MFMA Section 22 & 23	April '22
e) LGMTEC - Provincial analysis (PT and DLG) of the 5-year draft IDP & Budget.	Mun. Manager Directors Budget Office IDP Coordinator	Provincial Feedback/recommendations report on Draft IDP and Budget for consideration in the final IDP & Budget.	MFMA Section 34	April - May '22
f) Executive Management analyse public comments on Draft IDP and Budget and prepare report with recommendations for Council's perusal.	IDP Coordinator CFO Mun. Manager/Direc tors	Report with recommendations on public comments on Agenda	MFMA Section 22(a); MSA Section 21A	May '22
<b>16. 3RD QUARTER CORPORATE PERFORMANCE REPORT</b>				
a) Prepare and Submit 2021/22 Third Quarter Corporate Performance Report to Executive Management.	Compl.& PMS Officer Mun. Manager Budget Office	Finalise 3 <sup>rd</sup> Quarter Corporate Performance Report for inclusion on Council Agenda	MPPMR - Section 13 (2) PMS Framework	April '22
h) Submit 2021/22 Third Quarter Performance Report to Oversight Committee	Mun. Manager	To provide oversight and in-year performance monitoring	Section 79 of Municipal Structures Act	April '22
b) Third quarter performance assessments of Section 57 managers	Mun. Manager	To assess performance against targets	PMS Framework	April '22



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
c) Table 2021/22 Third Quarter Corporate Performance Report to Council.	Mun. Manager CFO	Third Quarter Corporate Performance Report considered by Council	MPPMR Section 13 MFMA Section 52 (d)	April '22
d) Place 2021/22 Third Quarter Corporate Performance Report on website and make available to Provincial and National Treasury.	Compl.& PMS Officer Budget Office	Third Quarter Corporate Performance Report published and submitted	MFMA Section 75 (2) MSA 21(b) MBRR Section 31	May '22
e) Submit quarterly status report on the implementation of Performance Management to Performance Audit Committee	Compl.& PMS Officer Internal Auditor	Report on MPAC Agenda	MFMA Section 166 MPPMR Regulation 14	May '22
f) Table Bi- Annual Report ( <b>Jul-Dec</b> ) of Audit and Performance Committee on Performance Management to Council.	Mun. Manager	Report on Council Agenda	MFMA Section 166 MPPMR Regulation 14	June '22
<b>17. APPROVAL OF 2022-2023 IDP AND BUDGET</b>				
a) Council considers comments from all stakeholders ( <b>including LGMTEC report</b> ) on draft IDP and Budget and revise IDP and Budget accordingly if necessary.	Mun. Manager CFO/Directors Council	Draft IDP and Budget revised	MBRR Section 16(1)	May '22
b) Table 5-year IDP and Budget, Tariff List and budget related policies to Council for final approval.	Mayor / CFO Mun. Manager	Approved 5-year IDP and Budget	MFMA Section 24 and 25 MSA Reg. 2(1)	May ' 22
c) Submission of approved IDP and Budget to National and Provincial Treasuries in both printed and electronic formats.	Budget Office IDP Coordinator	Submission of approved IDP and Budget and related documents and resolutions	MFMA Section 24(3) MBRR Regulation 20	Within 10 days after final approval
d) Publish the approved 5-year IDP and Budget on municipality's website.	Budget Office IDP Coordinator	Publication of approved IDP and annual budget and related documents	MFMA Section 22 MBRR Section 18 MSA Sections 21A and 21B	Within 10 days after final approval
e) Submission of IDP to MEC of Local Government.	IDP Coordinator	Submission of approved IDP	MSA Section 32 (1)	Within 10 days after final approval
<b>18. APPROVAL OF 2022/23 TOP LAYER SDBIP</b>				
a) The Executive Mayor may submits the draft SDBIP with the IDP and Budget documentation to be tabled in Council	Mun. Manager	Draft SDBIP Submitted to Council	MBRR- Regulation 14(3)	May '22
b) Municipal Manager submits draft 2022/23 SDBIP to the Executive Mayor for consideration.	IDP Coordinator Mun. Manager	Approved 2022/23 Top Layer SDBIP, 14 days after approval of the budget	MFMA Section 69(3)(a)	June'22



DELIVERABLE AND ACTIVITY	RESPONSIBLE PERSON	PURPOSE / OUTPUT	LEGISLATIVE REQUIREMENT AND INFORMATION	TIME FRAME
c) Executive Mayor approves 2022/23 SDBIPs within 28 days after approval of budget	Compl. & PMS Officer/ Mun. Manager	Approved 2022/23 Top Layer SDBIP	MFMA Section 53(1)(c)(ii)(2)	June '22
d) Publish 2022/23 SDBIP on municipal website.	Compl. & PMS Officer	SDBIP published on website	MBRR - Chapter 2, Part 3, 15(3) / MFMA	Jun'22
e) Submit 2022/23 Corporate SDBIP to National and Provincial Treasury and make public	Compl. & PMS Officer	Approved SDBIP Submitted	MFMA Section 53(3)(a) MBRR Chapter 2, Part 3, 15(3) and 20 (2)(b)	Jun'22



## 9. TIME SCHEDULE FOR IDP PUBLIC PARTICIPATION SESSIONS

Date 2021	Day	Time	Ward	Venue	Ward Councillor	Facilitator	CDW Support
02 November 2021	TUES	18:00	1	Murraysburg Townhall, Beaufort Street	October Haarvoor	Mr L Lakay/G Adolph	N.Kabi
03 November 2021	WED	18:00	2	Beaufort West Primary, Pastorie Street	Derrick Ernst Welgemoed	Mr L Lakay/G Adolph	H.Boesak
04 November 2021	THURS	18:00	2	Restvale Primary School hall, Nelspoort	Derrick Ernst Welgemoed	Mr L Lakay/G Adolph	H.Boesak
09 November 2021	TUES	18:00	3	Volle Evangelie Kerk, Booyesen Avenue, Nieveld Park	Lena Basson	Mr L Lakay/G Adolph	W.Abrahams
10 November 2021	WED	18:00	4	Kwa Mandlenkosi Community hall, Kwa Mandlenkosi	De Bruin Castro Luyanda	Mr L Lakay/G Adolph	R.Twani
11 November 2021	THURS	18:00	5	Rustdene Community hall, C/O de Vries- & Bantom Street	Kilani Mcebisi Anthony	Mr L Lakay/G Adolph	L.Gaba
16 November 2021	TUES	18:00	6	Pinkster Eenheid Kerk, Ebenezer Avenue, Rustdene	Wentzel Euna	Mr L Lakay/G Adolph	
17 November 2021	WED	18:00	7	George Frederick School hall, Merweville	Jacob Jeffrey vd Linde (Alderman)	Mr L Lakay/G Adolph	S.Plaatjies
18 November 2021	THURS	18:00	7	Beaufort West Primary, Pastorie Street	Jacob Jeffrey vn Linde (Alderman)	Mr L Lakay/G Adolph	J.Esbach