

uMGUNGUNDOVU DISTRICT MUNICIPALITY



IDP/BUDGET PROCESS PLAN FOR 2009/10 INTEGRATED DEVELOPMENT PLAN

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1. INTRODUCTION

1.1 THE INTEGRATED DEVELOPMENT PLANNING PROCESS

The Integrated Development Planning (IDP) Process is a process through which municipalities prepare strategic development plans for a five-year period. An IDP is one of the key tools for Local Government to cope with its new developmental role and seeks to arrive at decisions on issues such as municipal budgets, land management, promotion of local economic development, and institutional transformation in a consultative, systematic and strategic manner.

According to the Municipal Systems Act (MSA) of 2000, all municipalities have to undertake an IDP process to produce Integrated Development Plans (IDPs). As the IDP is a legislative requirement, has a legal status and it supersedes all other plans that guide development at local government level.

Districts and Local Municipalities have come to an end of a five year term for their councilors. New councilors will be elected and that means the new councilors will decide whether to adopt the existing IDP or start a new one. In terms of Section 24 (3) of the MSA:

A newly elected municipal council may-

(a) within the prescribed period referred to in subsection (1), adopt the integrated development plan of its predecessor, but before taking a decision it must comply with section 29(1)(b)(i),and (d) which says that the local communities must be consulted on its development needs and priorities be consistent with any other matters that may be prescribed by regulation

(b) a newly elected council that adopts the IDP of its predecessor with amendments must effect the amendments in accordance with the process referred to in section 34(b which stipulates that a municipal council may amend its integrated development plan in accordance with a prescribed process.

Section 26 stipulates the core components of the graded development plans as the following:

An IDP 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 municipal services

- (c) the council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;
- (d) the council's development strategies which must be aligned with any national or provincial sectoral plans and planning requirements binding on the municipality;
- (e) the 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

Section 28 of the Municipal Systems Act, Act 32 of 2000 stipulates the following:

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

Section 34 of the MSA states that :-

A municipal council -

- (a) must review its integrated development plan,
 - (j) annually in accordance with an assessment of its performance measurements in terms of section 4 i; and
 - (ii) to the extent that changing circumstances so demand; and may amend its integrated development plan in accordance with a prescribed process.

2. INSTITUTIONAL ARRANGEMENTS

2.1 Internal Role Players

- Council and the Executive Committee;
- Economic Development Planning Committee
- Municipal Manager;
- IDP Manager;
- IDP Task Team (Management);
- District Technical Coordinating Committee(MM's Forum); and
- District Mayors Coordinating Committee

2.2 External Role players

- Department of Local Government and Traditional Affairs;
- Relevant Government Departments;
- Representative Forum Members/Civil Society;
- IDP Coordinators Committee (IDP Managers/Coordinators); and
- Local Amakhosi

3. ROLES AND RESPONSIBILITIES

3.1 Municipal Manager / IDP Manager

- Undertake the overall management and co-ordination of the planning process;
- Ensure that all relevant actors are appropriately involved,
- Nominate persons in charge of different roles;
- Be responsible for the day- to-day management of the drafting process;
- Ensure that the planning process is participatory, strategic and implementation orientated and is aligned with and satisfies sector planning requirements;
- Respond to comments on the draft IDP from the public, horizontal alignment and other spheres of government to the satisfaction of the municipal council;
- Ensure proper documentation of the results of the planning of the IDP document;
- That conditions for participation are provided;
- That all outcomes are being documented;
- Chairing of the IDP Task Team;
- Adjust the IDP in accordance with the MEC for Local Government's proposals; and
- Even if the Municipal Manager delegates some of these functions to an IDP Manager on his/her behalf, he/she is still responsible and accountable.
- Drive the process of drawing the process plan for the review.

3.2 IDP Task Team (Management)

- Provide relevant technical, sector and financial information for analysis for determining priority issues;
- Contribute technical expertise in the consideration and finalisation of strategies and identification of projects;
- Provide departmental operational and capital budgetary information;
- Responsible for the formulation and /or revision of objectives and strategies for their respective business unit;
- Responsible for the preparation of project proposals, the integration of projects and sector programmes;
- Responsible for preparing amendments to the draft IDP for submission to the municipal council for approval and the MEC for Local Government for alignment.

3.3 Executive Committee (EXCO) and Full Council

- Consider and adopt a Process Plan;
- Consider, adopt and approve the IDP
- Monitoring the implementation of the IDP.
- Ensuring that the review process complies with the prescribed legislation.

3.4 Ward Committees

- Link the planning process to their constituencies and/or wards;
- Be responsible for organising public consultation and participation;

3.6 IDP Representatives Forum

- Represent the interests of their constituents in the IDP process
- Provide an organisational mechanism for discussion, negotiation and decision making between the stakeholders including municipality
- Ensure communication between all the stakeholder representatives including the municipality
- Monitor the performance of the planning and implementation process
- Participate in the process of setting up and monitoring “key performance indicators” in line with the “Performance Management Manual”.

3.7 Sector Departments

- Contribute relevant **information** on the provincial sector departments' plans, programmes, budgets, objectives, strategies and projects in a concise and accessible manner;
- Contribute sector expertise and **technical knowledge** to the formulation of municipal strategies and projects
- Participate in the provincial management system and coordination.

3.8 District Technical Coordinating Committee (MMs Forum)

- Monitoring of the IDP process
- Ensuring horizontal alignment of the IDPs of the municipalities in the district council area;
- Ensuring vertical alignment between district and local planning;
- Facilitation of vertical alignment of IDPs with other spheres of government and sector departments;
- Preparation of joint strategy workshops with local municipalities, provincial and national role players and other subject matter specialists

3.9 District Mayors Coordinating Committee

The Forum is a consultative forum for the District Municipality and the Local Municipalities to discuss and consult each other on matters of mutual interest, including –

- draft national and provincial policy and legislation relating to matters affecting local government interests in the District;
- the implementation of national and provincial policy and legislation with respect to such matters in the District;
- matters arising in the Premier's Coordination Forum;
- mutual support in terms of section 88 of the Municipal Structures Act (Act 117 of 1998);
- service delivery in the District; and
- coherent planning and development in the District.

4. ACTION PLAN

Activity No.	Action / Task for IDP/ Budget and PMS	Timeframe Task Completion (Planned)	Timeframe Task Completion (Actual)	Output
1.	Prepare Draft IDP / Budget Framework and Process Plan	June 2008	July 2008	Draft IDP/Budget Framework and Process Plans
2.	1 st IDP Task Team to discuss draft Framework and Process Plan	July 2008	08 Aug 2008	Draft IDP/Budget Framework and Process Plans
3.	IDP Committee Technical	July 2008	05 Aug 2008	Draft IDP/Budget Framework and Process Plans
4.	IDP Coordinators Committee	July 2008	20 Aug 08	Draft IDP/Budget Framework and Process Plans
5.	EXCO to adopt Framework and Process Plan	July 2008	21 Aug 2008	Approved IDP/Budget Framework and Process Plans
6.	Council adopt IDP Framework and IDP / Budget Process Plan	July 2008	19 Sept 2008	Approved IDP/Budget Framework and Process Plans
7.	Advertise IDP/Budget Process Plan	August 2008	29Sept-10 Oct 2008	Public Participation
8.	Submit Process Plan to Department of Local Government and Traditional Affairs	August 2008	08Sept 2008	Submission of Process Plans
9.	Review Status Quo/ Analysis Phase	September 2008	Sept - mid Oct 2008	Status Quo Report
10.	2 nd Technical Committee to discuss Status Quo Report	September 2008	09 Sept 2009	Status Quo Report
11.	2 ND IDP Coordinators Committee to discuss Status Quo Report	September 2008	08 Oct 2008	Status Quo Report
12.	Review Objectives, Strategies and Performance Indicators First Quarter Review (2008_2009)	October 2008	November 2008	Strategies Report Revised Budget and SDBIP
13.	Service Providers Alignment Workshop Departmental Budget Inputs	October 2008	31 Oct 2008 02 Dec 2008	Sector Projects Outcomes, priorities and objectives as

Activity No.	Action / Task for IDP/ Budget and PMS	Timeframe Task Completion (Planned)	Timeframe Task Completion (Actual)	Output
			(follow-up)	identified by the user departments for the inclusion / revision of the IDP and Budget allocations.
14.	Projects Identification and Review	November 2008	December 2008	Project List
15.	Align draft IDP with draft budget estimates	November 2008	December 2008	Aligned Budget and IDP
16.	Integrate finalized sector plans.	November 2008	Continuous	A list of Revised Sector Plans
17.	Departments Prepare Project Implementation Plans	November 2008	January 2009	Project Implementation Plans
18.	Mid term Review 3 rd IDP Task Team Meeting	December 2008	December 2008	Expenditure Analysis for input for the proposed new Financial Year 1 st Draft IDP
19.	First Capital and Operational Draft Budget 3 rd Technical Committee Meeting	December 2008	27 March 2009 02 December 2008	1 st Draft IDP & Budget
20.	EXCO Meeting recommends 1 st draft to Full Council for Adoption	December 2008	20 March 2009	1 st Draft IDP
21.	Adoption of the 1 st Draft IDP by Council Notify in writing all Local Municipalities and other stakeholders of all planned transfers for the 3 year period Invite inputs for the CFO'S Forum	December 2008 January 2008	27 March 2009 26 Feb 2009 13 March 2009	1 st Draft IDP Aligned District / Local Municipality Proposed Budget Inputs to draft budget
22.	Table first draft budget Submit 1 st draft IDP to DLGTA for Provincial IDP Assessment	February 2008 March 2009	19 March 2009 27 March 2009	1 st Draft budget tabled at least 90 days prior to the start of the new financial year 1 st Draft IDP submitted
23.	Assessment by Provincial IDP Forum	April 2009	30 Mar-03 April 2009 @ Richards Bay	Comments from the Provincial Forum

Activity No.	Action / Task for IDP/ Budget and PMS	Timeframe Completion (Planned)	Task	Timeframe Completion (Actual)	Task	Output
24.	<ul style="list-style-type: none"> Advertise and host public consultative forum for public comments Mayoral Izimbizo 	April 2009		<ul style="list-style-type: none"> 06-30 April 2009 Izimbizo: <ul style="list-style-type: none"> 03/04/09 Richmond LM 04/04/09 Impendle LM 05/04/09 Mkhambathini LM 07/04/09 uMshwathi LM 		Public consultation
25.	District IDP Engagements	April 2009		03 April 2009 @ Richards Bay		Way forward from Engagements
26.	5 th Task Team Meeting	April 2009		06 May 2009		Report back on Provincial IDP Assessments
27.	Amend draft IDP in accordance with Provincial IDP Assessment comments	May 2009		May 2009		Amended IDP
28.	<ul style="list-style-type: none"> Adoption of final 2009/2010 Budget by Council 	May - June 2009		29 May 2009		<ul style="list-style-type: none"> Approve Budget and Resolution approving the budget.
29.	<ul style="list-style-type: none"> Approval of final 2009/2010 IDP by Exco 	June 2009		19 June 2009		<ul style="list-style-type: none"> Approved 2009/2010 IDP
30.	<ul style="list-style-type: none"> Adoption of final 2009/2010 IDP by Council 	June 2009		29 June 2009		<ul style="list-style-type: none"> Adopted 2009/2010 IDP
31.	Submit the municipality's final IDP to DLGTA	June 2009		10 July 2009		Submission
32.	Submit Service Delivery and Budget Implementation plans to Council	28 July 2009		28 July 2009		Submission

5. MECHANISMS AND PROCEDURES FOR PUBLIC PARTICIPATION

5.1 MECHANISMS FOR PARTICIPATION:

As with the preparation of the IDP, the public participation process in the IDP Review Process has to be institutionalized – in order to ensure that all residents have an equal right to participate.

The following participation mechanisms are proposed:

5.1.1 IDP REPRESENTATIVE FORUM:

The Forum will represent all stakeholders and will be as inclusive as possible. Additional organizations will be encouraged to participate in the Forum throughout the process.

5.1.2 MEDIA:

Amongst other means, the local press will be used to inform the community of the progress with respect to the 2009/10 IDP Review.

5.1.3 IZIMBIZO

These will be more broad based and will target members of the community at a greater scale and ward specific.

6. MECHANISMS AND PROCEDURES FOR ALIGNMENT

ROLEPLAYERS:

While the IDP process is a local process, as became evident during the IDP preparation process, it requires substantial input and support from other spheres of government i.e. national and provincial departments (as well as service providers). There accordingly needs to be alignment with these role-players. In essence, the roles of the various spheres of government in the IDP Review process are anticipated as follows:

- **National Linkages:** The national sphere of government should at least provide a framework for the preparation of the Sectoral Plans, and where possible funding for such plans. This will contribute to the creation of a normative framework and consistency between municipalities. The national sphere should also coordinate and prioritise programmes and budgets between sectors and the national sphere in line with the framework.
- **Provincial Level:** As with the National Government, the Provincial Government should prepare Sectoral Guidelines and funding for the preparation of Sectoral Plans. The preparation of the Sector Plans and programmes and district programmes also needs to be coordinated and aligned.
- **Local Government:** Local Government has to review IDPs and prepare Sectoral Plans. In order to ensure that the 2009/10 IDP Review process is undertaken in a holistic manner, it is essential that there is interaction and alignment between the uMgungundlovu District Municipality and the local municipalities located within the uMgungundlovu District:
- The uMgungundlovu District Municipality, in consultation with local municipalities of the district, has prepared a framework plan (as required in terms of Section 27 of the Municipal Systems Act, 2000) to co-ordinate all planning activities during the review process.
- The District Municipality will also organise district level IDP alignment meetings and workshops between all municipalities, as well as between municipalities and service providers.
- In order to ensure that the IDP process is carried out in a holistic manner, interaction between the district municipality and its local municipalities is essential. Jointly the IDP Technical and Coordinating Committee exist to ensure this alignment.

7. COST ESTIMATE FOR THE PLANNING PROCESS

The 2009/ 2010 Integrated Development Plan will be prepared in-house, facilitated by the Planning and Implementation Management Support (PIMS) centre. The estimated costs below reflect the anticipated costs for the current financial year IDP Review.

ITEM	COST ESTIMATES
Rep Forum x1	50 000
Adverts	15 000
Task Team Meetings x5	-
Technical Committee Meetings x5	-
Coordinators Committee Meeting x5	-
IDP Alignment Workshops/Meetings	30 000
IDP Booklets	60 000
TOTAL	155 000

8. LIST OF ANNEXURES

- Annexure A: Terms of Reference for the IDP Task Team
- Annexure B: Terms of Reference for the District Technical Coordinating Committee
- Annexure C: Terms of Reference for the District Mayors Coordinating Committee
- Annexure D: Terms of Reference for the IDP Representative Forum
- Annexure E: [Framework for IDP and Budget Process Management Plan for 2009/10](#)

ANNEXURE A

UMGUNGUNDLOVU DISTRICT MUNICIPALITY: IDP TASK TEAM

1. Purpose of the IDP Task Team

Every municipality is obliged to prepare an IDP in terms of Chapter 5 of the Municipal Systems Act. The IDP is a principle strategic document, which will guide and inform all planning, management, investment, development and implementation decisions within the uMgungundlovu District Municipality.

The uMgungundlovu Task Team will support the Municipal Manager, who is responsible for the IDP, in the execution of his task to manage and co-ordinate the IDP process.

In terms of the guideline IDP manual, the IDP Task Team is intended to be a working group made up of dedicated Heads of Departments and other senior officials, who support the IDP Manager and ensure a smooth planning process. Although the IDP Manager is responsible for the IDP process, functions can be delegated to members of the Task Team.

Further, the IDP Task Team has no decision-making powers, but is an advisory body to the Representative Forum.

2. Terms of Reference for uMgungundlovu IDP Task Team

- To support the Municipal Manager and/ or the IDP Manager;
- To support and advise the Representative Forum on Technical issues;
- To ensure that all stakeholders are included in the Representative Forum;
- To commission relevant and appropriate research studies;
- To consider and comment on the inputs from National and Provincial Departments and service providers;
- Prepare, facilitate and uMgungundlovu IDPs Representative Forum.

3. Composition of the uMgungundlovu IDP Task Team:

- Chair: The Municipal Manager
- Secretariat: Committee Division
- Composition: Municipal Manager, Strategic Executive Managers; Managers; Managers, Planners and GIS Officer

ANNEXURE B

UMGUNGUNDLOVU DISTRICT MUNICIPALITY: DISTRICT TECHNICAL COORDINATING COMMITTEE

1. Purpose of the District Technical Coordinating Committee

The uMgungundlovu Technical Coordinating Committee has been established to create the forum where alignment will take place between the district and its 7 local municipalities. The alignment of the Process Plans of the 8 Municipalities comprising the District, is guided by the Framework Plan, prepared and approved in terms of Section 27, of Chapter 5 of the Municipal Systems Act (2000). The Framework Plan outlines joint timeframes and the key alignment milestones to be followed by all municipalities.

2. Terms of Reference for District Technical Coordinating Committee

- Monitoring of the IDP process
- Ensuring horizontal alignment of the IDPs of the municipalities in the district council area;
- Ensuring vertical alignment between district and local planning;
- Facilitation of vertical alignment of IDPs with other spheres of government and sector departments;
- Preparation of joint strategy workshops with local municipalities, provincial and national role players and other subject matter specialists

3. Composition of the District Technical Coordinating Committee:

- Chair: UMDM Municipal Manager
- Secretariat: Committee Division
- Composition: Municipal Managers from District and Local Municipalities

Local Municipalities:

uMshwathi
Mpofana
IMpendle
Msunduzi
Mkhambathini
Richmond
uMngeni

ANNEXURE C
UMGUNGUNDLOVU DISTRICT MUNICIPALITY: DISTRICT MAYORS
COORDINATING COMMITTEE

1. Purpose of the District Mayors Coordinating Committee

The object of the Forum is to promote and facilitate intergovernmental relations and cooperative government between the District Municipality and the Local Municipalities, including –

- (a) to seek unity of purpose and coordination of effort around the District's development priorities; and
- (b) to ensure effective and efficient service delivery unhampered by jurisdictional boundaries.

2. Terms of Reference for District Mayors Coordinating Committee

The Forum is a consultative forum for the District Municipality and the Local Municipalities to discuss and consult each other on matters of mutual interest, including –

- draft national and provincial policy and legislation relating to matters affecting local government interests in the District;
- the implementation of national and provincial policy and legislation with respect to such matters in the District;
- matters arising in the Premier's Coordination Forum;
- mutual support in terms of section 88 of the Municipal Structures Act (Act 117 of 1998);
- service delivery in the District; and coherent planning and development in the District.

3. Composition of the District Mayors Coordinating Committee:

- Chair: UMDM Mayor
- Secretariat: Committee Division
- Composition: Mayors from District and Local Municipalities

Local Municipalities:

uMshwathi
Mpofana
IMpendle
Msunduzi
Mkhambathini
Richmond
uMngeni

ANNEXURE D

TERMS OF REFERENCE FOR THE IDP REPRESENTATIVE FORUM

1. Purpose of the IDP Representative Forum

Every Municipality is obliged to prepare an IDP Review in terms of Chapter 5 of the Municipal Systems Act (2000). The IDP is a principle strategic document, which will guide and inform all planning, management, investment, development and implementation decisions within the uMgungundlovu District Municipality.

The newly established uMgungundlovu IDP Task Team is responsible for the establishment of the uMgungundlovu IDP Representative Forum. The IDP Representative Forum is the structure which institutionalises and ensures representative participation in the IDP process.

IDP Representative Forum represents the interests of all the constituents, at level of the uMgungundlovu District, in the IDP process. Any person, organisation, stakeholder or interest group that wishes to serve in the Representative Forum, should submit an application to the uMgungundlovu District Municipality.

2. Terms of Reference for the uMgungundlovu IDP Representative Forum:

- Represent the interests of the District level constituents in the uMgungundlovu IDP process.
- Provide a forum and mechanism for discussion, negotiation and decision making between stakeholders, including municipal government, in the uMgungundlovu IDP process.
- To ensure communication between all stakeholder representatives, including the municipal government, in the uMgungundlovu IDP process.
- To ensure alignment takes place at various levels.
- To monitor the performance of the planning and implementation process.

3. Chairperson of the uMgungundlovu IDP Representative Forum:

The Mayor of uMgungundlovu District Municipality or a nominated member of the uMgungundlovu District Executive Committee.

4. Secretariat to the uMgungundlovu IDP Representative Forum:

Committee Division

5. Composition of the uMgungundlovu IDP Representative Forum:

The uMgungundlovu IDP Representative Forum is the structure which institutionalises and guarantees representative participation in the IDP process. The selection of members of the IDP Representative Forum needs to be based on criteria which ensures geographical and social interest representation.

- Members of the uMgungundlovu Executive Committee.
- All uMgungundlovu Councillors, particularly ensuring portfolio committee representation and input.
- Mayors, Deputy Mayors and relevant portfolio committee Councillors from the 7 local Municipalities.
- Regional level Amakhosi and/or their representatives from uMgungundlovu District.
- Municipal Manager; IDP Manager; Heads of Departments and relevant Senior officials of the uMgungundlovu District Municipality
- Municipal Manager; IDP Manager and relevant officials from the 7 local municipalities
- Representatives from the National and Provincial Government Departments
- Parastatals; Utilities and Service Providers.
- Representatives from the organised formal and informal Business Sector.
- Representatives from organised labour.
- Representatives from other stakeholders.
- Representatives from other stakeholder groupings (in response to the public advertisement).

6. Code of conduct:

- Quorum:

For a meeting to proceed, at least 50% plus one member needs to be present. If a meeting is postponed, due to a lack of quorum, a special meeting will be called. In the case where a quorum could not be reached at the special meeting, the meeting will continue regardless.

- Meetings:

Meetings should take place on a monthly basis to discuss issues relevant to the composition of the IDP, to provide input into the process and the referencing of project progress at key milestones.

- Absent members:

Where representatives of an organisation have not attended two meetings, the organisation will be notified in writing. The organisation has the right to replace the representative as member of the uMgungundlovu Representative Forum.

- Voting:

Each organisation has the right to vote

- Number of Representatives per organisation

Each organisation may nominate two members to serve on the Representative Forum.

ANNEXURE E

FRAMEWORK FOR IDP AND BUDGET PROCESS MANAGEMENT PLAN FOR 2009/10

uMgungundlovu District Municipality				
Objectives and Timetable relating to the Multi-Year Budget process 2009-2012				
OBJECTIVES RELATING TO MULTI-YEAR BUDGET PROCESS 2009-2012	TIME TABLE FOR MULTI-YEAR BUDGETS 2009-2012			
July-2008 To July -2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Monthly report to Mayor in terms of Section 71 of MFMA	10-Jul-08	10-Jul-09	10-Jul-10	Municipal Manager Chief Financial Officer
First IDP Technical meeting	23-Jul-08	23-Jul-09	23-Jul-10	Municipal Manager SEM:Planning and Develop
Adoption of Time Schedule and IDP Process Plan	30-Jul-08	30-Jul-09	30-Jul-10	Council
Quarterly report to Council in terms of Section 52(d) of MFMA	30-Jul-08	30-Jul-09	30-Jul-10	Mayor Municipal Manager Chief Financial Officer
Advertise Process Plan and Notification of the IDP Forum Meeting	30-Jul-08	30-Jul-09	30-Jul-10	Municipal Manager SEM:Planning and Develop

Aug-2008 To Aug-2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Review status quo report	1 – 15 Aug- 08	1 – 15 Aug 09	1 – 15 Aug- 10	SEM: Planning & Dev
Monthly report to Mayor in terms of Section 71 of MFMA	10-Aug-08	10-Aug-09	10-Aug-10	Municipal Manager Chief Financial Officer
Consult on any proposed new or changes to external mechanisms for service delivery.	12-Aug-08	11-Aug-09	10-Aug-10	Municipal Manager ALL SEM's
Closing Date for comments in Draft Process Plan	15-Aug-08	15-Aug-09	15-Aug-10	Municipal Manager ALL SEM's
Second IDP Technical Meeting	18-Aug-08	17-Jul-09	16-Jul-10	Municipal Manager SEM:Planning and Develop
Review Objectives and Strategies	18 – 29 Aug 08	18 – 29 Aug 09	18 – 29 Aug -10	SEM: Planning & Dev
Meetings with all Local Municipalities with regard to IDP Process (Technical)	20-Aug-08	20-Aug-09	20-Aug-10	Municipal Manager SEM:Operations
Prepare internal analysis of financial and non-financial performance of previous years .	23-Aug-08	22-Aug-09	21-Aug-10	Municipal Manager Chief Financial Officer HODS
First IDP Forum meeting	28-Aug-08	21-Aug-09	20-Aug-10	Municipal Manager SEM:Planning and Develop

Analyze gaps between actual and planned performance and assess the impacts on next three-year plans.	30-Aug-08	25-Aug-09	24-Aug-10	Municipal Manager Chief Financial Officer HODS
Based on financial statements previous years and performance review, determine the financial position of the municipality and assess its financial capacity and potential impacts on future strategies and budgets.	30-Aug-08	29-Aug-09	28-Aug-10	Municipal Manager Chief Financial Officer
Submit Annual Financial Statements to Auditor General	31-Aug-08	31-Aug-09	31-Aug-10	Chief Financial Officer
Sep-2008 To Sep-2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Identify programmes and projects	1 – 12 Sept	1 – 12 Sept	1 – 12 Sept	
IDP Public meetings together with Local Municipalities	6-28 Sep 2008	6-28 Sep 2009	6-28 Sep 2010	Municipal Manager Chief Financial Officer HODS
KZN Strategic Planning Indaba	18-Sep-08	TBC by Province	TBC by Province	DLGTA KZN Municipalities Relevant Govt Depts
Monthly report to Mayor in terms of Section 71 of MFMA	10-Sep-08	10-Sep-09	10-Sep-10	Municipal Manager Chief Financial Officer
Identify all factors that impact on future budgets and determine broad financial parameters.	17-Sep-08	12-Sep-09	11-Sep-10	Municipal Manager Chief Financial Officer
Determine the funding revenue envelope potentially available for next three years.	20-Sep-08	15-Sep-09	16-Sep-10	Chief Financial Officer

Determine the most likely financial outlook and identify need for changes to fiscal strategies.	20-Sep-08	15-Sep-09	16-Sep-10	Municipal Manager Chief Financial Officer
Refine funding policies including tariff structures.	25-Sep-08	21-Sep-09	23-Sep-10	Municipal Manager Chief Financial Officer
Prepare initial allocations based on past year's performance, financial capacity and future outlook.	30-Sep-08	29-Sep-09	30-Sep-10	Municipal Manager Chief Financial Officer
Oct-2008 To Oct-2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Articulates outcomes, objectives, priorities and outputs desired for the next 3 years	5-Oct-08	6-Oct-09	7-Oct-10	Municipal Manager Chief Financial Officer HODS
National Regulators (e.g. NER, DWAF, F&FC) and External Mechanism entities review and update pricing strategies for next three years.	10-Oct-08	9-Oct-09	8-Oct-10	Municipal Manager Chief Financial Officer HODS
Monthly report to Mayor in terms of Section 71 of MFMA	10-Oct-08	10-Oct-09	10-Oct-10	Municipal Manager Chief Financial Officer
Third IDP Technical Meeting	7-Oct-08	7-Oct-09	7-Oct-10	Municipal Manager SEM: Planning and Develop
Municipality negotiate on proposed price changes for next three years under external mechanisms agreements.	15-Oct-08	13-Oct-09	14-Oct-10	Municipal Manager Chief Financial Officer HODS
Municipality receive other inputs from Local Municipalities, National and Provincial Government and other bodies on factors influencing the budget.	17-Oct-08	12-Oct-09	11-Oct-10	Municipal Manager Chief Financial Officer HODS

Present draft IDP review report to Exco and Council . Council informs strategic objectives as identified in the IDP	22-Oct-08	22-Oct-09	22-Oct-10	Council Exco
Prepare drafts for IDP and the capital and operational plans with cost and revenue estimates.	22-Oct-08	22-Oct-09	22-Oct-10	Municipal Manager Chief Financial Officer HODS
Council confirms strategic objectives as identified in the IDP	22-Oct-08	22-Oct-09	22-Oct-10	Council
Advertise Draft IDP Review report	27-Oct-08	27-Oct-09	28-Oct-10	SEM: Planning & Development
Quarterly report to Council in terms of Section 52(d) of MFMA	31-Oct-08	31-Oct-09	31-Oct-10	Mayor Municipal Manager Chief Financial Officer
Nov-2008 To Nov -2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Prepare estimates of preliminary functional allocations based on projections on past performance and adjusted for known factors, known commitments (e.g. backlogs) and asset maintenance requirements.	8-Nov-08	10-Nov-09	11-Nov-10	Municipal Manager Chief Financial Officer HODS
Monthly report to Mayor in terms of Section 71 of MFMA	10-Nov-08	10-Nov-09	10-Nov-10	Municipal Manager Chief Financial Officer
Closing Date for comments in Draft IDP Review Report	13-Nov-08	13-Nov-09	13-Nov-10	SEM: Planning & Development
Adjust plans to align with revenue available and policy priorities.	15-Nov-08	14-Nov-09	13-Nov-10	Municipal Manager Chief Financial Officer HODS

Second IDP Forum meeting	17-Nov-08	17-Nov-09	17-Nov-10	Municipal Manager SEM: Planning and Develop
Align all IDP's from Local Municipalities with that from the District	20-Nov-08	20-Nov-09	20-Nov-10	Municipal Manager Chief Financial Officer HODS
Assess impacts on tariffs and user charges.	21-Nov-08	20-Nov-09	19-Nov-10	Municipal Manager Chief Financial Officer
Dec-2008 To Dec2011	DATE	DATE	DATE	RESPONSIBLE PERSON
Municipal Manager report to the Executive Committee on budget and IDP options on medium term (3 year) proposals.	5-Dec-08	5-Dec-09	4-Dec-10	Municipal Manager Chief Financial Officer
Report to the Executive Committee on preliminary budget and IDP medium term proposals.	5-Dec-08	5-Dec-09	4-Dec-10	Municipal Manager Chief Financial Officer
Final adoption IDP review by Council and submission of report to the MEC	5-Dec-08	5-Dec-09	4-Dec-10	Municipal Manager Council
Monthly report to Mayor in terms of Section 71 of MFMA	10-Dec-08	10-Dec-09	10-Dec-10	Municipal Manager Chief Financial Officer
Jan-2009 To Jan 2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Monthly report to Mayor in terms of Section 71 of MFMA	10-Jan-09	10-Jan-10	10-Jan-11	Municipal Manager Chief Financial Officer

Continue finalization of detailed plans and budgets.	17-Jan-09	16-Jan-10	14-Jan-11	Municipal Manager Chief Financial Officer HODS
Performance Assessment in terms of Section 72(1) of MFMA	25-Jan-09	25-Jan-10	25-Jan-11	Municipal Manager Chief Financial Officer HODS
Assess mid year review of previous years budget for impacts on budgets for next three years. Submit adjustment budget to Council for approval	31-Jan-09	30-Jan-10	29-Jan-11	Mayor Municipal Manager Chief Financial Officer
Quarterly report to Council in terms of Section 52(d) of MFMA	31-Jan-09	31-Jan-10	31-Jan-11	Mayor Municipal Manager Chief Financial Officer
Submit audit report and comments there-on to Council	31-Jan-09	31-Jan-10	31-Jan-11	Municipal Manager Chief Financial Officer
Submit annual report to Council in terms of Section 127(2) of MFMA	31-Jan-09	31-Jan-10	31-Jan-11	Mayor Municipal Manager Chief Financial Officer
Review tariffs, charges Policies and develop options for changes needed to be included in the budget.	31-Jan-09	30-Jan-10	29-Jan-11	Municipal Manager Chief Financial Officer
Feb-2009 To Feb -2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Monthly report to Mayor in terms of Section 71 of MFMA	10-Feb-09	10-Feb-10	10-Feb-11	Municipal Manager Chief Financial Officer
Advise all Local Municipalities of their allocations for the next financial year (Section 37 (2) of MFMA)	15-Feb-09	15-Feb-10	15-Feb-11	Municipal Manager Chief Financial Officer
Mayor to table tariff changes and Policy revisions	21-Feb-09	20-Feb-10	21-Feb-11	Mayor

Incorporate any changes from National and Provincial governments on three-year allocations.	24-Feb-09	20-Feb-10	21-Feb-11	Municipal Manager Chief Financial Officer
Integrate and align the budget and IDP documentation.	24-Feb-09	20-Feb-10	21-Feb-11	Mayor Municipal Manager Chief Financial Officer
Finalize budget for next three years in prescribed formats and submit copies of Budget to National, Provincial Treasury and other Organs of State	24-Feb-09	20-Feb-10	21-Feb-11	Mayor Municipal Manager Chief Financial Officer
Mayor to table draft Multi-Year Budget to Council	24-Feb-09	20-Feb-10	19-Feb-11	Mayor
Appoint Oversight Committee to deal with annual report	28-Feb-09	28-Feb-10	28-Feb-11	Council
Mar-2009 To Mar -2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Workshop with Local Municipalities on Draft Budget	7-Mar-09	6-Mar-10	7-Mar-11	Mayor , CFO Municipal Manager Heads of departments
Monthly report to Mayor in terms of Section 71 of MFMA	10-Mar-09	10-Mar-10	10-Mar-11	Municipal Manager Chief Financial Officer
Undertake community consultation on budget.	10 Mar-31 Mar09	11 Mar-31 Mar 10	11 Mar-31 Mar 11	Mayor , CFO Municipal Manager Heads of departments
Deal with annual report in terms of Section 121(1) of MFMA	31-Mar-09	31-Mar-10	31-Mar-11	Council
Adopt oversight & annual report in terms of section 129(1) of MFMA	31-Mar-09	31-Mar-10	31-Mar-11	Council

Apr-2009 To Apr – 2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Monthly report to Mayor in terms of Section 71 of MFMA	10-Apr-09	10-Apr-10	10-Apr-11	Municipal Manager Chief Financial Officer
Changes from Local Municipalities and other stakeholders	11-Apr-09	10-Apr-10	9-Apr-11	Municipal Manager Chief Financial Officer HODS
Finalize budget implementation and service delivery plans and incorporate in budget documentation summaries of these plans.	20-Apr-09	19-Apr-10	18-Apr-11	Municipal Manager Chief Financial Officer HODS
Mayor incorporates feedback from community and national and provincial governments and if required revise the budget.	21-Apr-09	20-Apr-10	10-Apr-11	Mayor , CFO Municipal Manager Heads of departments
Quarterly report to Council in terms of Section 52(d) of MFMA	29-Apr-09	30-Apr-10	30-Apr-11	Mayor Municipal Manager Chief Financial Officer
Mayor tables revised budget to Council	29-Apr-09	29-Apr-10	28-Apr-11	Mayor
Municipal Council approves budget.	29-Apr-09	29-Apr-10	28-Apr-11	Council
May-2009 To May -2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Publish budget and forward copy of approved budget to National and Provincial Government.	9-May-09	8-May-10	7-May-11	Municipal Manager Chief Financial Officer
Monthly report to Mayor in terms of Section 71 of MFMA	10-May-09	10-May-10	10-May-11	Municipal Manager Chief Financial Officer

Municipal Manager prepares SDBIPS and submit to Mayor	13-May-09	13-May-10	12-May-11	Municipal Manager Chief Financial Officer HODS
Publish tariffs in Provincial Gazette and local news papers and website	15-May-09	14-May-10	13-May-11	Municipal Manager SEM: Corporate Services
Mayor approves SDBIPS	27-May-09	27-May-10	26-May-11	Mayor
June-2009 To June -2012	DATE	DATE	DATE	RESPONSIBLE PERSON
Monthly report to Mayor in terms of Section 71 of MFMA	10-Jun-09	10-Jun-10	10-Jun-11	Municipal Manager Chief Financial Officer
Complete and sign within 14 days after SDBIPS have been approved, the annual performance agreements for Section 57 employees	10-Jun-09	12-Jun-10	11-Jun-11	Mayor Municipal Manager
Mayor ensures that these agreements are in accordance with Systems Act and linked to objectives in budget.	10-Jun-09	11-Jun-10	10-Jun-11	Mayor Municipal Manager
Make public the SDBIPS and Performance agreements, Place on the web site, submit to Council and forward copies to MEC for Local Government (Section 75 of MFMA)	15-Jun-09	11-Jun-10	10-Jun-11	Mayor Municipal Manager