



CAPE AGULHAS MUNICIPALITY

PROCESS PLAN

INTEGRATED DEVELOPMENT PLAN AND BUDGET PREPARATION 2017 –2022

Compiled in terms of sections 28 and 29 of the Municipal Systems Act, No 32 of 2000
Approved on 30 August 2016
Resolution 176/2016

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1 INTRODUCTION

Integrated development planning is a legislated process whereby the Municipality prepares a five-year strategic plan which is known as the Integrated Development Plan (IDP).

The IDP is the principle strategic planning document of the Municipality, and all planning and development, as well as decisions relating to planning, and development in the Municipality must be based on the IDP.

The IDP identifies and prioritises Municipal and Community needs and integrates them into a singular local level plan which indicates how resources will be allocated to addressing these needs over the five year cycle of the IDP. The IDP also identifies critical development needs which fall within the functional mandate of the Overberg District Municipality, and other spheres of Government and indicates how these needs will be addressed in the short, medium and long term and how they align to municipal planning.

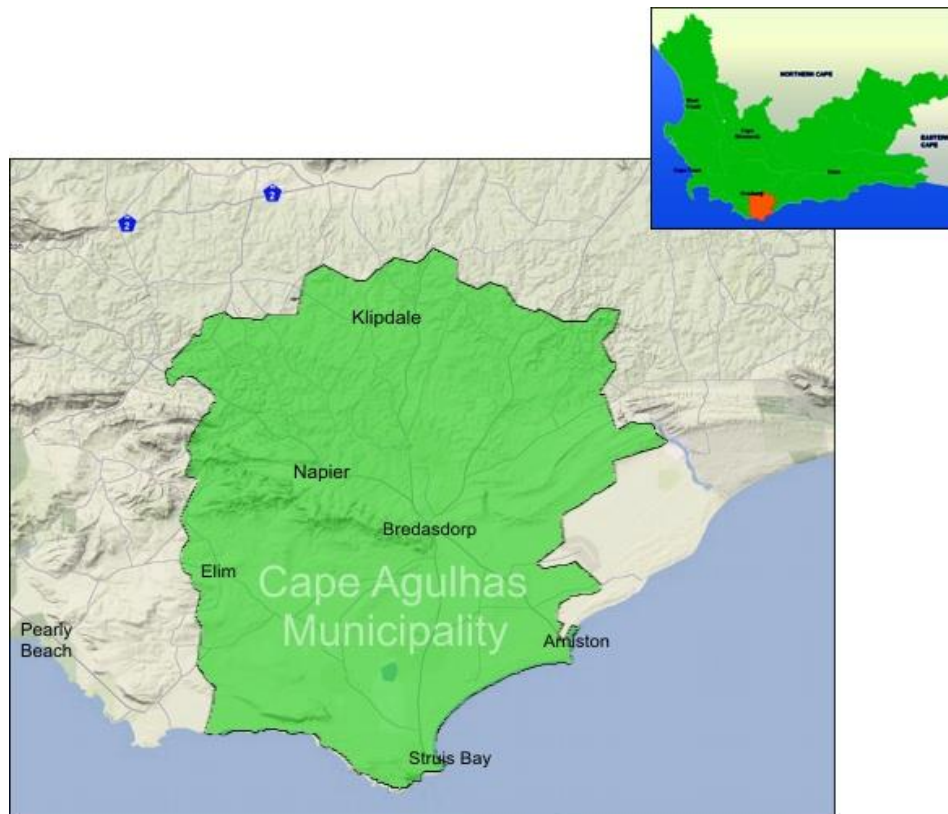
The Municipal Council must adopt an IDP within one year after the municipal election, and this IDP remains in force for the council's elected term (a period of five years). The IDP is reviewed annually to ensure on-going alignment to changing circumstances. The purpose of this Process Plan is to set out the process that will be followed in drafting the IDP for the period 2017-2022 as well as subsequent annual reviews.

This Process Plan explains the IDP cycle, sets out the applicable legislative framework and identifies the stakeholders who need to participate in the process with their roles and responsibilities. The plan concludes with a detailed programme with actions, dates and links to applicable legislation. It also demonstrates the integration and alignment between the budget and performance processes of the Municipality.

1.1 SCOPE OF APPLICATION OF THE IDP

The IDP will be applicable to the Cape Agulhas Municipal Area which comprises a geographic area of 2411km² and includes 9 urban settlements namely Bredasdorp which is the administrative seat, Napier, Struisbaai, Arniston / Waenhuiskrans, Elim, L'Agulhas, Klipdale, Protem and Suiderstrand as well as an extensive rural area.

FIGURE 1: MAP OF CAPE AGULHAS MUNICIPALITY



Cape Agulhas Municipality has been demarcated into 6 wards for the 2016 Municipal election in accordance with the Local Government Municipal Demarcation Act, No 27 of 1998. The wards are constituted as follows:

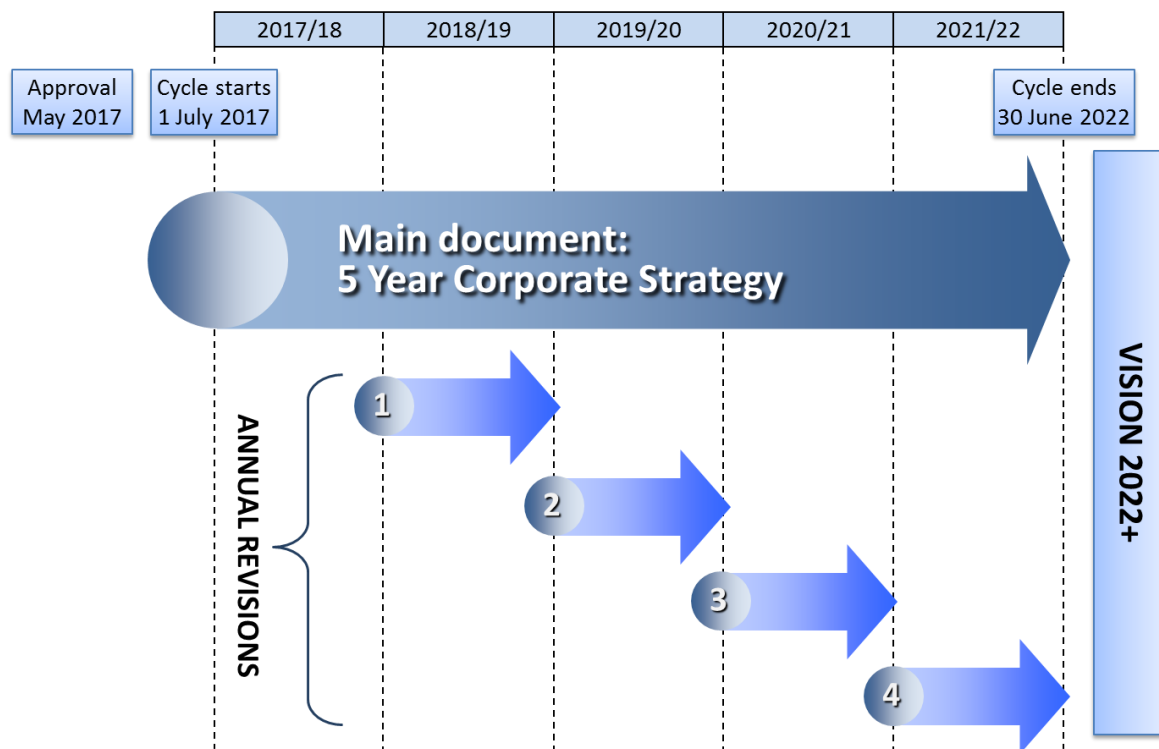
TABLE 1: WARD DEMARCATION

WARD	AREA
1	Napier, Elim, Spanjaardskloof, Houtkloof and surrounding farming areas,
2	Part of Bredasdorp and Klipdale,
3	Part of Bredasdorp which includes the low cost housing scheme (Kleinbegin), Zwelitsha and Simunye
4	Part of Bredasdorp including the Central Business District, Protem and surrounding farms
5	Suiderstrand, L'Agulhas, Struisbaai and Haasvlakte
6	Amiston and surrounding Farms, Overberg Test Range, Part of Bredasdorp (Selfbou and Bergsig area)

1.2 THE FIVE YEAR IDP CYCLE

This IDP is known as a 4th generation IDP because it is the 4th IDP done by Municipalities since promulgation of the Municipal Systems Act in 2000. The five year IDP cycle of the 4th generation IDP is depicted in the figure below:

FIGURE 2: FIVE YEAR IDP CYCLE



1.3 PHASES OF THE ANNUAL IDP CYCLE

The IDP is reviewed annually and hence there is also an annual IDP cycle which forms the basis of the municipal budgeting and performance management process. The annual phases apply to the development and revision of the IDP and are as follows.

TABLE 2: ANNUAL IDP PROCESS

PHASE	TASKS	MECHANISMS
Analysis	External analysis:	
	<ul style="list-style-type: none"> - Spatial - Social - Economic - Environmental - Sector needs and issues 	<ul style="list-style-type: none"> - Sector plans - Spatial Development Framework - Stakeholders discussions - Annual customer satisfaction survey
	Compilation of area plans:	
	<ul style="list-style-type: none"> - Ward profiles - Identification of any services backlogs - Priority issues 	<ul style="list-style-type: none"> - Ward committee meetings

		<ul style="list-style-type: none"> - Public IDP / Councillor feedback meetings - Inputs by departments
	Internal analysis:	
	<ul style="list-style-type: none"> - Critical issues / challenges - Minimum service levels 	<ul style="list-style-type: none"> - In-house exercise by departments - Performance assessment
	Inter-governmental alignment:	
	<ul style="list-style-type: none"> - Alignment with National and Provincial Policies 	<ul style="list-style-type: none"> - Desk top study
Strategy and action plan	<ul style="list-style-type: none"> - Council and Management discuss strategic issues such as vision and mission, future directions, strategic goals and objectives, as well as programmes, actions, key performance indicators and targets for each strategic objective. 	<ul style="list-style-type: none"> - Strategy workshops - Stakeholder discussions - In-house exercise by Management Team
Approval of draft IDP and draft annual budget	<ul style="list-style-type: none"> - Finalise and approve draft IDP and draft annual budget 	<ul style="list-style-type: none"> - In-house preparation of the relevant documentation and submission to Council
Consultation and refinement	<ul style="list-style-type: none"> - Make public the draft IDP and draft annual budget for comments and submissions. - Submit the draft IDP and draft annual budget to prescribed organs of state - Consult the Overberg District Municipality on the draft IDP. - Consult the local community and other stakeholders 	<ul style="list-style-type: none"> - In-house exercise by Director Financial Services and Strategic Manager - Public meetings - Ward Committee meetings - CAMAF meeting
Final approval of IDP and annual budget	<ul style="list-style-type: none"> - Council approves the final IDP and final annual budget 	<ul style="list-style-type: none"> - In-house preparation of the relevant documentation and submission to Council

2 LEGISLATIVE FRAMEWORK

The following key legislation is applicable:

- ∞ The Constitution;
- ∞ The Local Government: Municipal Systems Act, Act 32 of 2000 (Municipal Systems Act) read together with the Municipal Planning and Performance Regulations, Regulation 796 of 2001 (Municipal Planning and Performance Regulations);
- ∞ The Local Government: Municipal Finance Management Act, Act 56 of 2003 (MFMA) read together with the Municipal Budgeting and reporting regulations.

2.1 THE CONSTITUTION

Sections 40 and 41 of the Constitution require the three spheres of government (National, Provincial and Local) to cooperate with one another and adhere to the principles of co-operative government and intergovernmental relations.

Section 152 (1) of the Constitution sets out the objectives of local government namely:

- ∞ To provide democratic and accountable government to the community;
- ∞ To ensure the sustainable provision of services to the community;
- ∞ To promote social and economic development;
- ∞ To promote a safe and healthy environment;
- ∞ To encourage communities and community organisations to get involved in local government matters.

Municipalities must give effect to their developmental duty which requires them to structure and manage their administration, budgeting and planning processes in a manner that gives priority to the basic needs of the community whilst promoting social and economic development of the community. Municipalities must also participate in National and Provincial Development Programmes (Section 153).

2.2 MUNICIPAL SYSTEMS ACT, ACT 32 OF 2000 (MSA)

Integrated development planning is primarily regulated by Chapter 5 of the Municipal Systems Act, Act 32 of 2000. This Chapter must be read together with Chapter 6 which regulates Performance Management as well as the Municipal Planning and Performance Regulations.

2.2.1 THE PROCESS PLAN

SECTION 28 OF THE MSA:

- (1) Each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan.*
- (2) The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, consult the local community before adopting the process.*
- (3) A municipality must give notice to the local community of particulars of the process it intends to follow.*

SECTION 29(1) OF THE MSA:

The process must -

- (a) be in accordance with a predetermined programme specifying timeframes for the different steps;*

- (b) through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for -
 - (i) the local community to be consulted on its development needs and priorities;
 - (ii) the local community to participate in the drafting of the integrated development plan; and
 - (iii) organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the integrated development plan;
- (c) provide for the identification of all plans and planning requirements binding on the municipality in terms of national and provincial legislation; and
- (d) be consistent with any other matters that may be prescribed by regulation.

2.2.2 CORE COMPONENTS

SECTION 26 OF THE MSA:

“An integrated development plan must reflect-

- (a) the municipal council's vision for the long term development of the municipality with special emphasis on the municipality's most critical development and internal transformation needs;*
- (b) an assessment of the existing level of development in the municipality, which must include an identification of communities which do not have access to basic municipal services;*
- (c) the council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;*
- (d) the council's development strategies which must be aligned with any national or provincial sectoral plans and planning requirements binding on the municipality in terms of legislation;*
- (e) a spatial development framework which must include the provision of basic guidelines for a land use management system for the municipality;*
- (f) the council's operational strategies;*
- (g) applicable disaster management plans;*
- (h) a financial plan, which must include a budget projection for at least the next three years; and*
- (i) the key performance indicators and performance targets determined in terms of section 41.”*

REGULATION 2 OF THE 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
- (i) provide a visual representation of the desired spatial form of the municipality, which representation -
 - (i) must indicate where public and private land development and infrastructure investment should take place;
 - (ii) must indicate desired or undesired utilisation of space in a particular area;
 - (iii) may delineate the urban edge;
 - (iv) must identify areas where strategic intervention is required; and
 - (v) must indicate areas where priority spending is required."

2.2.3 REVIEW OF THE IDP

MSA SECTION 34 OF THE MSA:

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.

2.3 MUNICIPAL FINANCE MANAGEMENT ACT, ACT 56 OF 2003 (MFMA)

Section 21 of the MFMA regulates the budget preparation process and requires the mayor of a municipality to co-ordinate the processes of preparing the annual budget and reviewing the municipality's integrated development plan and budget related policies to ensure that the tabled budget and any revisions of the integrated development plan and budget-related policies are mutually consistent and credible.

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:

- “(i) the preparation, tabling and approval of the annual budget;
- (ii) the annual review of:
 - (aa) the integrated development plan in terms of section 34 of the Municipal Systems Act; and
 - (bb) the budget-related policies;

- (iii) ...
- (iv) any consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii)”

Section 53(1) (b) provides that the mayor of a municipality must co-ordinate the annual revision of the integrated development plan in terms of section 34 of the Municipal Systems Act and the preparation of the annual budget, and determine how the integrated development plan is to be taken into account or revised for the purposes of the budget.

3 PROCESS PREPARATION

The Process Plan aims to ensure that -

- ∞ Institutional arrangements are established and membership of committees and forums is confirmed;
- ∞ Roles and responsibilities are clarified and internal human resources allocated;
- ∞ The legislative requirements and principles of public participation and stakeholder engagement are complied with;
- ∞ Mechanisms and procedures are put in place to ensure alignment with external stakeholders such as other municipalities, districts and other spheres of government; and
- ∞ Legislative and policy prescripts relating to the drafting and approval of the Process Plan and IDP are adhered to.

4 MUNICIPAL STAKEHOLDER ANALYSIS

The Municipal Systems Act states that a Municipality consists of three equal partners namely the Council, the Administration and the Public. The co-operation between these partners needs to be structured for purposes of the IDP. This section sets out the roles and responsibilities of each.

4.1 THE MUNICIPAL COUNCIL

The Cape Agulhas Municipality is established in terms of Section 12 of the Municipal Structures Act, Act 118 of 1998 (Structures Act) as a Municipality with a Mayoral Executive System combined with a Ward Participatory System. The Municipal Council comprises:

- ∞ 11 Councillors, six of whom are Ward Councillors and five of whom are Proportional Representation (PR) Councillors.
- ∞ The Office of the Speaker who is the Chairperson of the Municipal Council and custodian of the Ward Committees.
- ∞ The Executive Mayor and Executive Mayoral Committee.

TABLE 3: MUNICIPAL COUNCIL ROLES AND RESPONSIBILITIES

ROLE PLAYER	ROLES AND RESPONSIBILITIES	OBJECTIVES
Executive Mayor (assisted by the Mayoral Committee) (Process "owner")	<ul style="list-style-type: none"> - Decide on planning process and nominate persons in charge - Monitor planning process - Responsible for the overall management, co-ordination and monitoring of the IDP drafting process 	<ul style="list-style-type: none"> - Ownership and accountability - Support the merit of the IDP process - Facilitate an openness to new / different ideas - Ensure commitment to the process / plan - Be accessible to the public - Get buy-in from the community - Improved communication to manage expectations - Communicate limited resources
Speaker	<ul style="list-style-type: none"> - Custodian of ward committees and the public participation process. 	<ul style="list-style-type: none"> - Greater participation / involvement - High quality dialogue - As simple and easy as possible to enable people to participate / contribute
Councillors	<ul style="list-style-type: none"> - Link integrated development planning process to their constituencies/wards - Ward based public participation 	

4.2 ADMINISTRATION

The Administration, comprises the Office of the Municipal Manager and 4 Directorates namely a Finance, Corporate Services, Community Services and Infrastructure Services Directorate. There is also an Electro Technical Directorate which reports directly to the Municipal Manager but this Directorate will in the near future relocate to the Infrastructure Directorate. The organisational structure is depicted below:

FIGURE 3: CAPE AGULHAS MUNICIPALITY ORGANISATIONAL STRUCTURE

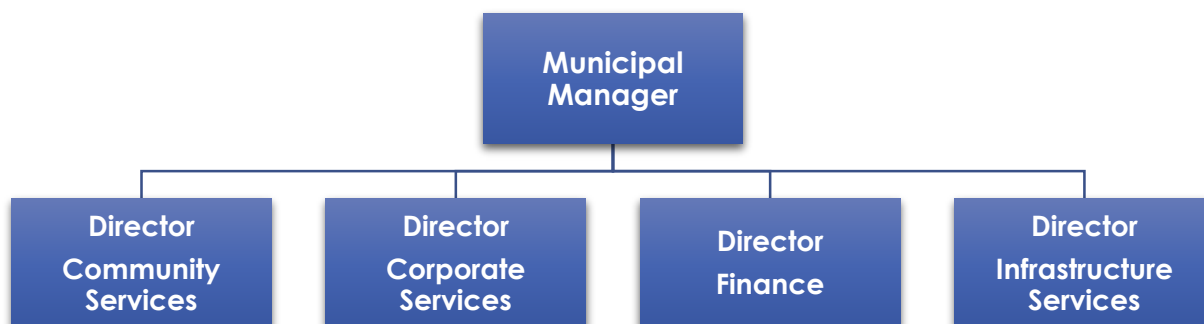


TABLE 4: ROLES AND RESPONSIBILITIES OF THE ADMINISTRATION

ROLE PLAYER	ROLES AND RESPONSIBILITIES	OBJECTIVES
Municipal Manager and Management Team (Responsible)	<ul style="list-style-type: none"> - Provide technical/sector expertise and information - Provide inputs related to the various planning steps - Summarise / digest / process inputs from the participation process - Discuss / comment on inputs from specialists 	<ul style="list-style-type: none"> - Greater participation / involvement - High quality dialogue - As simple and easy as possible to participate / contribute
Strategic Management Office (Process facilitator)	<ul style="list-style-type: none"> - Day-to-day management of the drafting process on behalf of the Municipal Manager (to ensure a properly managed and organised planning process) 	<ul style="list-style-type: none"> - Productive and efficient process management

4.3 THE COMMUNITY

Community participatory structures are primarily the 6 Ward Committees and the Cape Agulhas Advisory Forum (CAMAFA)

4.3.1 WARD COMMITTEES

The role of the Ward Committees with respect to the IDP are to -

- ∞ Assist the ward councillor in identifying challenges and needs of residents;
- ∞ Provide a mechanism for inputs, discussion and negotiation between the stakeholders within the ward;
- ∞ Advise and make recommendations to the ward councillor on matters affecting the ward;
- ∞ Disseminate information in the ward;
- ∞ Ensure constructive and harmonious interaction between the Municipality and community;
- ∞ Interact with other forums and organisations on matters affecting the ward;
- ∞ Draw up a ward plan that offers suggestions on how to improve service delivery in the particular ward;
- ∞ Monitor the implementation of the IDP in the ward.

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

4.3.2 CAPE AGULHAS MUNICIPAL ADVISORY FORUM

The Cape Agulhas Municipal Advisory Forum (CAMAF) functions as the IDP Representative Forum and comprises two members from each ward committee (12 members) as well as other key stakeholders designated by the Executive Mayor. The CAMAF will be re-constituted for the five year period at commencement of the process.

5 ALIGNMENT OF THE IDP TO OTHER PLANS OF GOVERNMENT

5.1 PURPOSE OF ALIGNMENT

Municipalities are required to adhere to the principles of co-operative governance and work cooperatively with other spheres of government to ensure that the IDP is not just a Municipal Plan but also a “*Single window of co-ordination*” for relationships between local and district municipalities and other spheres of government.

Alignment is the instrument to synchronize and integrate the IDP process between different spheres of government. The alignment process must reveal how National and Provincial Government and the District Municipality can tangibly assist this Municipality in achieving its developmental objectives.

The desired outcome of inter-governmental alignment is –

- ∞ to make government as a whole work together;
- ∞ to improve the impact of its programmes; and

- ∞ to work towards achieving common objectives and outcomes, particularly with respect to economic growth for job creation and addressing the needs of the poor.

5.2 GOVERNMENTAL ROLES AND RESPONSIBILITIES

ROLE PLAYER	ROLES AND RESPONSIBILITIES
Local Municipality	<ul style="list-style-type: none"> - Prepare and adopt the IDP Process Plan. - Undertake the overall management and co-ordination of the IDP process which includes ensuring that : <ul style="list-style-type: none"> o all relevant role-players are appropriately involved; o appropriate mechanisms and procedures for community participation are applied; o actions are undertaken in accordance with the approved process plan / time schedule; o the IDP responds to the critical issues in the municipality; and o sector planning requirements are satisfied. - Prepare and adopt the IDP. - Adjust the IDP in accordance with the MEC's proposals if necessary. - Ensure that the sector plans, budget and performance management system are linked to and based on the IDP.
District Municipality	<ul style="list-style-type: none"> - Same roles and responsibilities as local municipalities but related to the preparation of a District IDP. The District Municipality must also prepare a District Framework (Sec 27 of the MSA). - Fulfil a coordination and facilitation role by - <ul style="list-style-type: none"> o ensuring alignment of the IDP's of the municipalities in the district; o ensuring alignment between district and local planning; o facilitation of alignment of IDP's with other spheres of government and sector departments; and o preparation of joint strategy workshops with local municipalities, provincial and national role-players and other subject matter specialists.
Provincial Government	<ul style="list-style-type: none"> - Ensure horizontal alignment of the IDP's of the district municipalities within the province. - Ensure vertical/sector alignment between provincial sector departments/ provincial strategic plans and the IDP process at local/district level by - <ul style="list-style-type: none"> o guiding the provincial sector departments' participation in and their required contribution to the municipal IDP process; and o guiding them in assessing draft IDP's and aligning their sector programmes and budgets with the IDP's. - Efficient financial management of provincial IDP grants.

	<ul style="list-style-type: none"> - Monitor the progress of the IDP processes. - Facilitate resolution of disputes related to IDP. - Assist municipalities in the IDP drafting process where required. - Organise IDP-related training where required. - Co-ordinate and manage the MEC's assessment of IDP's.
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6 IDP SOURCE DOCUMENTS

The Integrated Development Planning process is guided by a number of legal and policy documents that impose a range of demands and requirements on the Municipality. The list below contains the some of the most important IDP source documents:

- ∞ **Acts**
 - Constitution of South Africa (1996)
 - Municipal Structures Act (117 of 1998)
 - Municipal Systems Act (32 of 2000)
 - Disaster Management Act (57 of 2002)
 - Municipal Finance Management Act (56 of 2003)
 - Spatial Planning and Land Use Management Act (16 of 2013)
- ∞ **Regulations**
 - Municipal Planning and Performance Management Regulations (August 2001)
 - Municipal Budget and Reporting Regulations (April 2009)
 - Regulations in terms of the Spatial Planning and Land Use Management Act (March 2015)
- ∞ **National policy**
 - National Development Plan (2012)
 - Medium-Term Strategic Framework: 2014 – 2019
 - Back to Basics Approach - September 2014
 - Integrated Urban Development Framework 2016-2019
- ∞ **Provincial policy**
 - Western Cape's Provincial Strategic Plan: 2014-2019
 - Western Cape Provincial Spatial Development Framework - March 2014

7 ANNUAL REVISION

- 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 its performance in terms of implementation and its achievement of its targets and strategic objectives. The review must be based on this assessment as well as changing circumstances. The annual review must inform the municipality's financial and institutional planning and most importantly, the drafting of the annual budget and must therefore be completed timeously to properly inform the latter.

The purpose of the annual review is therefore to -

- ∞ reflect and report on progress made with respect to the implementation of the 5 year strategy as contained in the IDP;
- ∞ make adjustments to the strategy if required as a result of assessment of performance and changing circumstances that impact on 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.

It is important to note that the review is not a replacement of the 5 year IDP, nor is it meant to interfere with the long-term strategic direction of the municipality to accommodate new whims and additional demands.

8 ALIGNMENT OF THE SPATIAL DEVELOPMENT FRAMEWORK REVIEW

The Municipality's SDF must align to the IDP and the Municipality has appointed a service provider to develop the Municipality's Spatial Development Framework to make it compliant with the Spatial Planning and Land Use Management Act (SPLUMA). The SDF must be completed within 18 months from 1 June 2016.

The service provider was specifically requested to align the SDF work programme to the IDP Process Plan and the SDF work schedule is attached as Appendix A. It clearly indicates the linkages to the Process Plan.

9 DETAILED PROCESS AND TIME SCHEDULE

The process set out in this section applies to the drafting and review of the IDP, with the exception of the timeframes which will be adjusted annually as part of the time schedule referred to in Section 21 of the MFMA.

ACTIVITY	Date	Legal Reference
JUNE / JULY 2016		
Draft IDP Process Plan <ul style="list-style-type: none"> - Table Draft IDP Process Plan - Publicise Draft IDP Process Plan for public input (Min. 21 days) 	28 June 9-5 Aug	MSA Section 28 (2): The municipality must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, consult the local community before adopting the process.
August 2016		
Women's Day	9 Aug	
Councillor Induction <ul style="list-style-type: none"> - Municipal Councillor Induction 	By 31 Aug	
Final IDP Process Plan <ul style="list-style-type: none"> - Submit to Council. - Submit to the Overberg District Municipality and the Provincial Government 	30 Aug	MSA Section 28 (1): <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.</i>
AFS and Annual Performance Report <ul style="list-style-type: none"> - Submit annual financial statements and annual performance report to the Auditor-General for auditing (within two months after the end of the financial year) 	31 Aug	MSA Section 126(1)(a): <i>The accounting officer of a municipality must prepare the annual financial statements of the municipality and, within two months after the end of the financial year to which those statements relate, submit the statements to the Auditor-General for auditing</i> MSA Section 46 (1): <i>A municipality must prepare for each financial year a performance report reflecting the performance of the municipality and of each external service provider during that financial year; a comparison of the performances referred to in paragraph (a) with targets set for and performances in the previous financial year; and measures taken to improve performance</i>

ACTIVITY	Date	Legal Reference
September 2016		
Heritage Day	24 Sep	
School holiday	30 Sep - 10 Oct	
Final IDP Process Plan - Publicise approval of the final IDP Process Plan.	8 Sept	MSA Section 28 (3): <i>A municipality must give notice to the local community of particulars of the process it intends to follow</i>
Councillor Induction - SALGA Councillor Induction	19-23 Sept	
Ward Committees - Establishment of 6 ward committees	1-30 Sept	MSTA 73. (1) <i>If a metro or local council decides to have ward committees, it must establish a ward committee for each ward in the municipality</i>
CAMAF - Re-constitute CAMAF for IDP Cycle	By 30 Sept	MPPR 15 (1) (a) <i>In the absence of an appropriate municipal wide structure for community participation, a municipality must establish a forum that will enhance community participation in - (i) the drafting and implementation of the municipality's IDP</i>
October 2016		
Public participation - Identification of municipal needs as well as needs falling within functional mandate of other organs of state for submission to them: - Public Meetings* o Ward 1 – Napier o Ward 1 – Elim o Ward 2- Bredasdorp o Ward 2- Klipdale o Ward 3- Bredasdorp o Ward 4- Bredasdorp o Ward 4- Proteem o Ward 5- Struisbaai o Ward 6- Arniston o Ward 6- Bredasdorp	1-30 Oct	MSA Section 29(1)(b): <i>The process followed by a municipality to draft its integrated development plan, including its consideration and adoption of the draft plan, must through appropriate mechanisms, processes and procedures established in terms of Chapter 4, allow for-</i> i. <i>the local community to be consulted on its development needs and priorities;</i> ii. <i>the local community to participate in the drafting of the integrated development plan; and</i> iii. <i>organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the integrated development plan.</i>

ACTIVITY	Date	Legal Reference
<ul style="list-style-type: none"> - Ward Committee meetings in each ward to review and prioritise ward needs - CAMAF Meeting to review and prioritise Municipal Area needs (CAMAF will include representatives from organs of state) - Mass communication e.g. press articles, Facebook, newsletters <p>* Public meetings for review process may be incorporated with quarterly feedback meetings of Councillors.</p>		
<p>Analysis</p> <ul style="list-style-type: none"> - Internal Analysis <ul style="list-style-type: none"> o critical issues / challenges with respect to every service o minimum service levels o institutional o financial o performance - External analysis <ul style="list-style-type: none"> o Data collation and analysis (StatsSA data etc) 	<p>1-30 Oct</p>	
November 2016		
<p>Internal Analysis -cont. External analysis – cont.</p>	<p>1-30 Nov</p>	
<p>Senior Management Analysis Workshop</p> <ul style="list-style-type: none"> - Review sector plans, financial position, and other relevant data to identify critical institutional priorities for discussion at Council Strategy Workshop. (Municipal Manager and Directors) 	<p>Week 1 Nov</p>	
<p>Council Strategy Workshop</p> <ul style="list-style-type: none"> - Reconcile different views and opinions of the political structures and administration and define the mission, vision and strategic objectives of Council for the term of the IDP after consideration of financial assessment, strategic risks, community needs and other relevant 	<p>Week 2 Nov</p>	<p>MSA Section 56. (2) <i>The executive mayor must -</i> <i>(a) identify the needs of the municipality;</i> <i>(b) review and evaluate those needs in order of priority</i></p>

ACTIVITY	Date	Legal Reference
information. (Councillors, Municipal Manager, Directors and Managers)		
Directorate Strategy Workshops (4) <ul style="list-style-type: none"> - Innovate and suggest solutions that contribute to the Strategic Goal(s) applicable to each Directorate - Prepare departmental operational plans and identify KPI's aligned to these strategic goals with due cognisance of inputs from other stakeholders including government and bulk service providers (and NER). (Directors, Managers and other key staff designated by the Director) 	Week 3 Nov	
Adjustment budget for current year <ul style="list-style-type: none"> - BTO Office to send out current year adjustment budget preparation documents to Directorates for completion 	By 30 Nov	MFMA Section 28 (1) <i>A municipality may revise an approved annual budget through an adjustments budget.</i>
New Budget preparation <ul style="list-style-type: none"> - BTO office to send out MSCOA compliant budget preparation documents to Directorates for completion (MTREF) <ul style="list-style-type: none"> o Capital o Operational o Policies o Tariffs 	By 30 Nov	MFMA Section 21 (1): <i>The mayor of a municipality must—</i> <i>(a) co-ordinate the processes for preparing the annual budget and for reviewing the municipality's integrated development plan and budget-related policies to ensure that the tabled budget and any revisions of the integrated development plan and budget-related policies are mutually consistent and credible</i>
Audit Report <ul style="list-style-type: none"> - Receive audit report on annual financial statements from the Auditor-General 	By 30 Nov	MFMA Section 126(3): <i>The Auditor-General must-</i> <i>(a) audit those financial statements; and</i> <i>(b) submit an audit report on those statements to the accounting officer of the municipality or entity within three months of receipt of the statements.</i>
December 2016		
Schools close	7 Dec	
Day of Reconciliation	16 Dec	
Christmas Day	25 Dec	
Day of Goodwill	26 Dec	
Management budget workshop	Week 1	

ACTIVITY	Date	Legal Reference
- Consider budgetary guidelines, circulars and internal parameters (Directors and Managers to attend)		
Long term financial plan - Review the Long term Financial Plan	By 15 Dec	MSA Section 26(h): <i>An integrated development plan must reflect a financial plan, which must include a budget projection for at least the next three years.</i>
Annual report - Submit draft of annual report to Council - incorporating financial and non-financial information on performance, audit reports and annual financial statements	By 15 Dec	MFMA 121 (1) <i>Every municipality and every municipal entity must for each financial year prepare an annual report in accordance with this Chapter. The council of a municipality must within nine months after the end of a financial year deal with the annual report of the municipality and of any municipal entity under the municipality's sole or shared control</i>
Adjustment budget - Directorates to submit completed current year adjustment budget documents to BTO	30 Dec	MFMA 28 (1). <i>A municipality may revise an approved annual budget through an adjustments budget.</i>
SDBIP amendments - Directorates to submit proposed current year SDBIP amendments to Strategic Services	30 Dec	
New Budget preparation - Directorates to complete budget preparation documents in line with operational plans and strategic priorities	Dec	
January 2017		
New Year's Day	1 Jan	
Public holiday	2 Jan	
Schools open	18 Jan	
New Budget preparation - Directorates to submit completed MTREF MSCOA compliant budget documents to BTO	20 Jan	
Mid-year budget and performance assessment - Submit mid- year budget and performance assessment to the Mayor, Provincial and National Treasury - Submit mid- year budget and performance assessment to the Council	25 Jan 31 Jan	MFMA Section 72 <i>(1) The accounting officer of a municipality must by 25 January of each year— (a) assess the performance of the municipality during the first half of the financial year, taking into account— (i) the monthly statements referred to in section 71 for the first half of the</i>

ACTIVITY	Date	Legal Reference
		<p>financial year;</p> <p>(ii) the municipality's service delivery performance during the first half of the financial year, and the service delivery targets and performance indicators set in the service delivery and budget implementation plan;</p> <p>(iii) the past year's annual report, and progress on resolving problems identified in the annual report; and</p> <p>(iv) the performance of every municipal entity under the sole or shared control of the municipality, taking into account reports in terms of section 88 from any such entities; and</p> <p>(b) submit a report on such assessment to—</p> <p>(i) the mayor of the municipality;</p> <p>(ii) the National Treasury; and</p> <p>(iii) the relevant provincial treasury.</p>
<p>Adjustment budget</p> <ul style="list-style-type: none"> - Submit adjustment budget to Council 	31 Jan	<p>MFMA Section 28.</p> <p>(1) A municipality may revise an approved annual budget through an adjustments budget.</p>
<p>SDBIP amendments</p> <ul style="list-style-type: none"> - Submit SDBIP amendments to Council 	31 Jan	<p>MFMA Section 54.</p> <p>(1) On receipt of a statement or report submitted by the accounting officer of the municipality in terms of section 71 or 72, the mayor must—</p> <p>(c) consider and, if necessary, make any revisions to the service delivery and budget implementation plan, provided that revisions to the service delivery targets and performance indicators in the plan may only be made with the approval of the council following approval of an adjustments budget;</p>
February 2017		
<p>Budget Steering Committee 1:</p> <ul style="list-style-type: none"> - Consider budgetary guidelines, circulars and internal parameters 	Week 1	
<p>Oversight report</p> <ul style="list-style-type: none"> - Submit the Oversight Report to Council (within 2 months of tabling of the draft Annual Report) 	By 15 Feb	<p>MFMA Section 129.</p> <p>(1) The council of a municipality must consider the annual report of the municipality and of any municipal entity under the municipality's sole or shared control, and by no later than two months from the date on which the annual report was tabled in the council in terms of section 127, adopt an oversight report containing the council's</p>

ACTIVITY	Date	Legal Reference
		<p>comments on the annual report, which must include a statement whether the council—</p> <p>(a) has approved the annual report with or without reservations;</p> <p>(b) has rejected the annual report; or</p> <p>(c) has referred the annual report back for revision of those components that can be revised.</p>
<p>New Budget</p> <ul style="list-style-type: none"> - BTO to Finalise the draft capital and operating budget and budget related policies 	<p>Before 28 Feb</p>	
<p>Transfers</p> <ul style="list-style-type: none"> - Receive notification of any transfers that will be made to the municipality from other municipalities in each of the next three fin years (by no later than 120 days before the start of its budget year) 	<p>Before 28 Feb</p>	<p>MFMA Section 37(2):</p> <p><i>In order to enable municipalities to include allocations from other municipalities in their budgets and to plan effectively for the spending of such allocations, the accounting officer of a municipality responsible for the transfer of any allocation to another municipality must, by no later than 120 days before the start of its budget year, notify the receiving municipality of the projected amount of any allocation proposed to be transferred to that municipality during each of the next 3 financial years.</i></p>
March 2017		
Human Rights Day	21 Mar	
School holiday	31 Mar	
<p>Council Budget workshop</p> <ul style="list-style-type: none"> - Directorates to present their operational plans and associated budgets to Council for input 	<p>Week 1</p>	
<p>Budget Steering Committee 2:</p> <ul style="list-style-type: none"> - Submit draft Budget and IDP [Review] to Budget Steering Committee 	<p>Week 3</p>	
<p>Draft IDP an Budget (Including Top Layer SDBIP)</p> <ul style="list-style-type: none"> - Table draft IDP [Review] and budget (including SDBIP) to Council 	<p>28 Mar</p>	<p>MFMA Section 16:</p> <p>(1) <i>The council of a municipality must for each financial year approve an annual budget for the municipality before the start of that financial year.</i></p> <p>(2) <i>In order for a municipality to comply with subsection (1), the mayor of the municipality must table the annual budget at a council meeting at least 90 days before the start of the budget year.</i></p>
April 2017		

ACTIVITY	Date	Legal Reference
Good Friday	14 Apr	
Family Day	17 Apr	
Freedom Day	27 Apr	
Schools open	10 Apr	
Publicise draft Budget including SDBIP <ul style="list-style-type: none"> - Make public the draft budget (including Top Layer SDBIP) and invite the community to submit representations. 	6 Apr	MFMA Section 22: <i>Immediately after an annual budget is tabled in a municipal council, the accounting officer of the municipality must</i> <i>(a) in accordance with Chapter 4 of the Municipal Systems Act -</i> <i>(i) Make public the annual budget and the documents referred to in Section 17(3); and</i> <i>(ii) invite the local community to submit representations in connection with the budget;</i> <i>(b) submit the annual budget -</i> <i>(i) in both printed and electronic formats to the National Treasury and the relevant provincial treasury; and</i> <i>(ii) in either formats to any prescribed national or provincial organs of state and to other municipalities affected by the budget.</i>
Publicise IDP [Review] <ul style="list-style-type: none"> - Make public the draft IDP and invite the community to submit representations. 	6 Apr	MPPM Regulation 3(4)(b): <i>No amendment to a municipality's integrated development plan may be adopted by the municipal council unless the proposed amendment has been published for public comment for a period of at least 21 days in a manner that allows the public an opportunity to make representations with regard to the proposed amendment.</i>
Submissions <ul style="list-style-type: none"> - Submit the draft budget (including SDBIP), IDP [Review] to the Local Government, Provincial Treasury, National Treasury and other affected organs of state 	By 6 April	MFMA Section 22: <i>Immediately after an annual budget is tabled in a municipal council, the accounting officer of the municipality must</i> <i>(a) in accordance with Chapter 4 of the Municipal Systems Act -</i> <i>(i) Make public the annual budget and the documents referred to in Section 17(3); and</i> <i>(ii) invite the local community to submit representations in connection with the budget;</i> <i>(b) submit the annual budget -</i> <i>(i) in both printed and electronic formats to the National Treasury and the relevant provincial treasury; and</i>

ACTIVITY	Date	Legal Reference
		(ii) in either formats to any prescribed national or provincial organs of state and to other municipalities affected by the budget.
Submissions <ul style="list-style-type: none"> Submit the draft IDP [Review] to the District Municipality 	By 6 April	MSA Section 29(3)(b): <i>A local municipality must draft its integrated development plan, taking into account the integrated development processes of, and proposals submitted to it by the district municipality.</i> MPPM Regulation 3(6): <i>A local municipality that considers an amendment to its integrated development plan must-</i> <i>(a) consult the district municipality in whose area it falls on the proposed amendment; and</i> <i>(b) take all comments submitted to it by the district municipality into account before it takes a final decision on the proposed amendment.</i>
Public participation <ul style="list-style-type: none"> Ward based budget meetings (6) Ward Committee meetings CAMAF Meeting 	10-29 April	MFMA Section 23(1): <i>When the annual budget has been tabled, the municipal council must consider any views of –</i> <i>(a) the local community; and</i> <i>(b) the National Treasury, the relevant provincial treasury and any provincial or national organs of state or municipalities which made submissions on the budget.</i>
May 2017		
Workers Day	1 May	
Closing date for submissions Public input on draft budget (including SDBIP), IDP [Review] closes	3 May	
Budget Steering Committee 3 Consideration of public inputs on draft budget (including SDBIP), IDP [Review]	By 9 May	MFMA Section 23(2): <i>After considering all budget submissions, the council must give the mayor an opportunity-</i> <i>(a) to respond to the submissions; and</i> <i>(b) if necessary, to revise the budget and table amendments for consideration by the council.</i>
Finalisation of new budget Completion of Annual Budget amendments / refinements	By 16 May	
Final approval of new budget		MFMA Section 24(1):

ACTIVITY	Date	Legal Reference
Table final budget (including SDBIP), IDP [Review] to Council (at least 30 days before the start of the budget year)	23 May	<i>The Council must at least 30 days before the start of the budget year consider the approval of the annual budget.</i> MPPM Regulation 3(3): <i>An amendment to a municipality's integrated development plan is adopted by a decision taken by a municipal council in accordance with the rules and orders of the council.</i>
June 2017 / July 2017		
Youth Day	16 Jun	
School holiday	23 Jun - 17 Jul	
Place the IDP [Review], annual budget, SDBIP all budget-related documents and all budget-related policies on the website (within 5 days of the adoption of the plan)	By 1 Jun	MFMA Section 75(1): <i>The accounting officer of a municipality must place on the website the following documents of the municipality:</i> <i>(a) the annual and adjustments budgets and all budget-related documents; and</i> <i>(b) all budget-related policies</i> MSA Section 21A(1)(b): <i>All documents that must be made public by a municipality in terms of a requirement of this Act, the Municipal Finance Management Act or other applicable legislation, must be conveyed to the local community by displaying the documents on the municipality's official website, if the municipality has a website as envisaged by section 21B.</i> MFMA Section 75(2): <i>A document referred to above must be placed on the website not later than five days after its tabling in the council or on the date on which it must be made public, whichever occurs first.</i>
Submit a copy of the revised IDP [Review] to the MEC for local government as well as Provincial Treasury (within 10 days of the adoption of the plan)	By 2 Jun	MSA Section 32(1)(a): <i>The municipal manager of a municipality must submit a copy of the integrated development plan as adopted by the council of the municipality, and any subsequent amendment to the plan, to the MEC for local government in the province within 10 days of the adoption or amendment of the plan.</i>
Give notice to the public of the adoption of the IDP [Review] (within 14 days of the adoption of the plan)	By 6 Jun	MSA Section 25(4)(a): <i>A municipality must, within 14 days of the adoption of its integrated development plan in terms of subsection (1) or (3) give notice to the public-</i>

ACTIVITY	Date	Legal Reference
		<p>(i) of the adoption of the plan; and</p> <p>(ii) that copies of or extracts from the plan are available for public inspection at specified places;</p> <p>MSA Section 21A(1)(a) and (c): All documents that must be made public by a municipality in terms of a requirement of this Act, the Municipal Finance Management Act or other applicable legislation, must be conveyed to the local community -</p> <p>(a) by displaying the documents at the municipality's head and satellite offices and libraries;</p> <p>(c) by notifying the local community, in accordance with section 21, of the place, including the website address, where detailed particulars concerning the documents can be obtained.</p>
Publicise a summary of the IDP (within 14 days of the adoption of the plan)	6 Jun	<p>MSA Section 25(4)(b): A municipality must, within 14 days of the adoption of its integrated development plan in terms of subsection (1) or (3) publicise a summary of the plan.</p>
Make public the approved annual budget and supporting documentation (including tariffs) (within 10 working days after approval of the budget)	6 Jun	<p>BUDGET & REPORTING REGULATIONS 2009, Reg 18:</p> <p>(1) Within ten working days after the municipal council has approved the annual budget of a municipality, the municipal manager must in accordance with section 21A of the Municipal Systems Act make public the approved annual budget and supporting documentation and the resolutions referred to in section 24(2)(c) of the Act.</p> <p>(2) The municipal manager must also make public any other information that the municipal council considers appropriate to facilitate public awareness of the annual budget, including-</p> <p>(a) summaries of the annual budget and supporting documentation in alternate languages predominant in the community; and</p> <p>(b) information relevant to each ward in the municipality.</p> <p>(3) All information contemplated in sub regulation (2) must cover:</p> <p>(a) the relevant financial and service delivery implications of the annual budget; and</p> <p>(b) at least the previous year's actual outcome, the current year's forecast outcome, the budget year and the following two years.</p>
Submit approved budget to the Provincial Treasury and National Treasury (within 10 working days after approval of the budget)	6 Jun	<p>MFMA Section 24(3):</p>

ACTIVITY	Date	Legal Reference
		<p>The accounting officer of a municipality must submit the approved annual budget to the National Treasury and the relevant provincial treasury.</p> <p>BUDGET & REPORTING REGULATIONS 2009, Reg 20:</p> <p>The municipal manager must comply with section 24(3) of the Act within ten working days after the municipal council has approved the annual budget.</p>
Submit the draft Top Layer SDBIP to the Executive Mayor with the draft annual performance agreements for the next year (within 14 days after approval of the budget)	6 Jun	<p>MFMA Section 69(3):</p> <p>(a) The accounting officer must no later than 14 days after the approval of an annual budget submit to the mayor a draft service delivery and budget implementation plan for the budget year.</p> <p>(b) The accounting officer must no later than 14 days after the approval of an annual budget submit to the mayor drafts of the annual performance agreements as required in terms of section 57(1)(b) of the Municipal Systems Act for the municipal manager and all senior managers.</p>
Executive Mayor takes all reasonable steps to ensure that the SDBIP is approved (within 28 days after approval of the budget)	20 Jun	<p>MFMA Section 53(1)(c)(ii):</p> <p>The mayor of a municipality must take all reasonable steps to ensure that the municipality's service delivery and budget implementation plan is approved by the mayor within 28 days after approval of the budget.</p>
Place the performance agreements and all service delivery agreements on the website	20 Jun	<p>MFMA Section 75(1):</p> <p>The accounting officer of a municipality must place on the website the following documents of the municipality:</p> <p>(d) performance agreements required in terms of section 57(1)(b) of the Municipal Systems Act; and</p> <p>(e) all service delivery agreements</p> <p>BUDGET & REPORTING REGULATIONS 2009, Reg 19:</p> <p>The accounting officer must place on the website all performance agreements required in terms of section 57(1)(b) of the Municipal Systems Act.</p>
Submit copies of the performance agreements to Council and the MEC for local government as well as the national minister responsible for local government (within 14 days after conclusion thereof).	4 Jul	<p>MFMA Section 53(3)(b):</p> <p>Copies of such performance agreements must be submitted to the council and the MEC for local government in the province.</p> <p>PERF REGS 2006 Reg(5):</p> <p>The employment contract and performance agreement must be submitted to the MEC responsible for local government in the relevant province as well as the national minister responsible for local government within fourteen (14) days after concluding the employment contract and performance agreement</p>

ACTIVITY	Date	Legal Reference
Submit the SDBIP to National and Provincial Treasury (within 10 working days approval of the plan)	4 Jul	<p>BUDGET & REPORTING REGULATIONS 2009, Reg 20(2)(b): <i>The municipal manager must submit to the National Treasury and the relevant provincial treasury, in both printed and electronic form the approved service delivery and budget implementation plan within ten working days after the mayor has approved the plan.</i></p>
Make public the projections, targets and indicators as set out in the SDBIP (within 10 working days after the approval of the SDBIP)	4 Jul	<p>MFMA Section 53(3)(a): <i>The mayor must ensure that the revenue and expenditure projections for each month and the service delivery targets and performance indicators for each quarter, as set out in the service delivery and budget implementation plan, are made public no later than 14 days after the approval of the service delivery and budget implementation plan.</i></p> <p>BUDGET & REPORTING REGULATIONS 2009, Reg 19: <i>The municipal manager must in accordance with section 21A of the Municipal Systems Act make public the approved service delivery and budget implementation plan within ten working days after the mayor has approved the plan in terms of section 53(1)(c)(ii) of the Act.</i></p>
Make public the performance agreements of Municipal Manager and senior managers (no later than 14 days after the approval of the SDBIP)	4 Jul	<p>MFMA Section 53(3)(b): <i>The mayor must ensure that the performance agreements of municipal manager, senior managers and any other categories of officials as may be prescribed, are made public no later than 14 days after the approval of the municipality's service delivery and budget implementation plan.</i></p>

Timeframes may be subject to amendment if circumstances dictate.

APPENDIX A: ALIGNMENT OF THE SDF DEVELOPMENT PROCESS WITH THE IDP

NO.	STEP IN PROCESS	EXPLANATION	SPECIFIC SPLUMA REQUIREMENTS	DELIVERABLES	RELATED IDP PROCESS ACTIVITY/ DATES	TIME FRAME	ROLE PLAYERS
1.	INCEPTION AND INSTITUTIONAL ARRANGEMENTS						
1.1.	PROJECT INCEPTION	<ul style="list-style-type: none"> Agree on the scope of work with sector stakeholders. Complete Service Level Agreement/ final project plan. 		Service Level Agreement/ project plan.	Integrate MSDF process with IDP process plan	July 2016	<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department
1.2.	IDENTIFY INTERESTED & AFFECTED PARTIES	<ul style="list-style-type: none"> Identify key I&APs that should be involved in the MSDF process. Identify provincial and municipal departments that need to be involved. Invite I&APs to register as participants as part of notification process. 		MSDF stakeholder database.	Utilise IDP database of I&APs		<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department
1.3.	NOTIFICATION	Give notice in Gazette and media that MSDF is to be prepared, and invite I&APs to register as participants in the process.	20 (3) a: Give notice of intent to develop MSDF	Notice in Gazette and media			<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department
1.4.	SET UP ISC	<ul style="list-style-type: none"> Invite key statutory stakeholders to serve on Inter Government Steering Committee (ISC) - a forum for inter-governmental relations with oversight responsibility for the preparation of the MSDF. Send out inaugural notice (via e-mail or other) to ISC to introduce and explain process, programme and outcomes. 		List of ISC members			<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department ISC

1.5.	ESTABLISH FOCUS GROUPS	Initiate establishment of Focus Groups for detailed issue/ area specific investigations.		List of proposed Focus Group members	<ul style="list-style-type: none"> • Link to establishment of ward committees (1-30 Sept. 2016) • Link to establishment of CAMAF (by 30 Sept. 2016) 		<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department
2. LEGISLATIVE AND POLICY REVIEW							
2.1.	REVIEW AND SYNTHESISE LEGISLATIVE AND POLICY CONTEXT	<ul style="list-style-type: none"> • Synthesise the legislative and policy context. • Involve sector departments through discussions on relevant sector plans/ policies. • Outline the spatial directives emanating from the national, provincial and municipal spatial policy review. 		Legislative and policy synthesis		July 2016	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department • Other Municipal Departments
2.2.	BASELINE REVIEW	<ul style="list-style-type: none"> • Obtain and review baseline targets that were set in previous MSDF or other spatial planning processes and policies. • Review previous targets in terms of Spatial Planning Outcomes. 		Review of baseline/ previous targets against SPOs	Targets must integrate with IDP/ municipal performance management system		MSDF service providers
3. PRINCIPLES AND DRAFT SPATIAL VISION							
3.1.	PRINCIPLES	Core principles directing the work.	21 (a): A MSDF must give effect to the development principles and applicable norms and standards set out in Chapter 2 of SPLUMA			July 2016	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department
3.2.	FORMULATE DRAFT SPATIAL VISION	Develop a draft spatial vision for the municipal area.	21 (c): MSDF must include a longer term spatial development vision statement for the municipal area	Draft vision statement			<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department

			which indicates a desired spatial growth and development pattern for the next 10 to 20 years				
4.	STATUS QUO ANALYSIS						
4.1.	IDP & SECTOR PLANS INPUTS	Review the most recent IDP/ relevant municipal sector plans and surrounding area sector plans in terms of the strategic focus and the key challenges identified.	20 (2): MSDF must be prepared as part of a municipality's IDP 21 (m): Provide the spatial expression of the coordination, alignment and integration of sectoral policies of all municipal departments	Summary of sector plans		Aug. - Oct. 2016	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department
4.2.	ANALYSIS OF BIOPHYSICAL ENVIRONMENT	Documentation and mapping of biophysical spatial challenges and opportunities.	21 (j): MSDF must 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	Documentation and mapping of biophysical spatial challenges and opportunities		Aug. - Oct. 2016	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department • I&APs • ISC
4.3.	ANALYSIS OF SOCIO-ECONOMIC ENVIRONMENT	Strategic analysis of the socio-economic situation of the municipality in terms of legacy, current and future challenges.	21 (e): MSDF must include population growth estimates for the next five years 21 (f): MSDF must include estimates of the demand for	Documentation and mapping of socio-economic spatial challenges and opportunities.			

			<p>housing units across different socio-economic categories</p> <p>21 (i): MSDF must identify the designated areas where a national or provincial inclusionary housing policy may be applicable</p> <p>21 (g): MSDF must include estimates of economic activity and employment trends and locations in the municipal area for the next five years</p>				
4.4.	ANALYSIS OF BUILT ENVIRONMENT	Strategic analysis of the built environment elements of the municipality in terms of legacy, current and future challenges.	<p>21 (h): MSDF must identify, quantify and provide location requirements of engineering infrastructure and services provision for existing and future development needs for the next five years</p> <p>21 (k): A MSDF must identify the designation of areas in the municipality where incremental upgrading approaches to development and regulation will be applicable</p>	Documentation and mapping of built environment spatial challenges and opportunities.			

			<p>21 (l): Identify the designation of areas in which:</p> <p>(i) more detailed local plans must be developed</p> <p>(ii) shortened land use development procedures may be applicable and land use schemes may be so amended</p> <p>21 (o): Determine the purpose, desired impact and structure of the land use management scheme to apply in that municipal area</p>				
4.5.	DRAFT STATUS QUO REPORT	Prepare draft status quo report.		Draft status quo report.	<ul style="list-style-type: none"> • Complete as input to public participation; area based through ward committees and municipal wide through CAMAF (by 30 Oct. 2016) • Complete as input to senior management analysis workshop (week 1 Nov. 2016) 		
ROUND 1 STAKEHOLDER ENGAGEMENT: STATUS QUO							
	FOCUS GROUPS	<ul style="list-style-type: none"> • Conduct Focus Group meetings to test the initial technical findings and get further input. • Engage with municipal departments, public entities, community representatives and all other related bodies 		Record of engagement	<ul style="list-style-type: none"> • Ward based identification of municipal needs • Ward committee meetings to prioritise needs • CAMAF meeting to review/ prioritise municipal wide 	Oct. 2016	<ul style="list-style-type: none"> • MSDF Service Providers • Focus Group Attendees

		based on the context of the municipality.			needs 1 - 30 Oct. 2016)		
	OPEN HOUSE	Facilitate a public open house to discuss and confirm key findings from the strategic technical analysis and focus group meetings.		<ul style="list-style-type: none"> Open house posters Record of engagement 	IDP mass communication (press, Facebook, newsletters)		General public
	1st PMT MEETING	Convene the first PMT meeting to discuss project progress/ programme.		Record of engagement			<ul style="list-style-type: none"> MSDF Service Providers Municipal Planning Department/ PMT
	1st ISC MEETING	<ul style="list-style-type: none"> Circulate the draft status quo report to the ISC. Convene the 1st ISC Meeting to present and endorse the findings from status quo phase. 		<ul style="list-style-type: none"> Presentation Record of engagement 			<ul style="list-style-type: none"> MSDF service providers ISC
ROUND 1 MONITORING AND EVALUATION: STATUS QUO							
	TARGET DETERMINATION	Gather updated census and other relevant measurable data in relation to challenges/ opportunities.		Updated data/ census Information.		Oct. 2016	MSDF service providers
SCHOOL HOLIDAY: 30 September - 10 October							
5.	SPATIAL PROPOSALS						
5.1.	SPATIAL CONCEPT & FINAL VISION	<ul style="list-style-type: none"> Formulation of a conceptual framework based on the synthesis of challenges and opportunities identified. Update the draft vision. 	21 (c): MSDF must 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.	<ul style="list-style-type: none"> Spatial concept diagram/ text. Final vision statement. 		Nov. 2016	<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department
5.2.	SPATIAL STRATEGIES	Develop spatial strategies in support of concept/ vision,	21 (o): Determine the purpose, desired impact and structure	Spatial strategy maps/ text.	<ul style="list-style-type: none"> Integrate with Council strategy 		<ul style="list-style-type: none"> MSDF service providers

		mitigating challenges and unlocking opportunities.	of the land use management scheme to apply in that municipal area.		workshop (week 2 Nov. 2016) • Integrate with directorate strategy workshops (week 3 Nov. 2016)		• Municipal Planning Department
5.3.	DRAFT MSDF	<ul style="list-style-type: none"> • Combine strategies into composite MSDF map. • Develop more detailed proposals for different settlements. • Combine concept, vision, strategies and proposals into composite MSDF report. 	<p>21 (b): A MSDF must include a written and spatial representation of a five-year spatial development plan for the spatial form of the municipality.</p> <p>21 (d): A MSDF must 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.</p>	Draft MSDF report/ map.	<p>Endeavour to complete in order to contribute to:</p> <ul style="list-style-type: none"> • Management budget workshop (week 1 Dec 2016.) • Adjustment budget (30 Dec 2016 - 31 Jan. 2017) • SDBIP amendments (30 Dec. 2016 - 31 Jan. 2017) • New budget (30 Dec. 2016 - 28 Feb. 2017) 		<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department
ROUND 2 STAKEHOLDER ENGAGEMENT: SPATIAL PROPOSALS							
	STAKEHOLDER INPUT	Facilitate/ convene specialist/ Focus Group discussions on strategies/ proposals.		List of engagements. Record of proceedings.		Jan. 2017	<ul style="list-style-type: none"> • MSDF service providers • Focus Group attendees
	2nd PMT MEETING	Convene the 2 nd PMT meeting to discuss project progress/ programme.		Discussion of project progress/ programme.			<ul style="list-style-type: none"> • MSDF service providers

							<ul style="list-style-type: none"> • Municipal Planning Department • MSDF service providers • Municipal Planning Department • General public
	ADVERTISING OF DRAFT MSDF	Advertise and make draft MSDF available for comment (online and at public facilities).	20 (3): Before adopting the MSDF, the Council must - (a) give notice of the proposed MSDF in the Gazette and the media; (b) invite the public to submit written representations to the Council within 60 days after the publication of the notice referred to in paragraph (a); (c) consider all representations received in respect of the proposed MSDF.	<ul style="list-style-type: none"> • Advertisements. • Publicly available draft MSDF. • Record of comments received. 			
ROUND 2 MONITORING AND EVALUATION: SPATIAL PROPOSALS							
	TARGET ESTABLISHMENT	Establish clear/ measurable targets for achievement of strategies/ proposals.		Indicators/ targets.		Jan. 2017	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department
SCHOOL HOLIDAY: 7 December - 18 January							
6.	IMPLEMENTATION FRAMEWORK						
6.1.	SUPPORTING POLICIES	Develop policies in support of MSDF implementation.		Draft policies.		Feb./ March 2017	<ul style="list-style-type: none"> • MSDF Service Providers • Municipal Planning Department
6.2.	SUPPORTING GUIDELINES	Develop guidelines in support of MSDF implementation.		Draft guidelines.			
6.3.	CAPITAL INVESTMENT FRAMEWORK	Develop a capital investment framework that identifies and prioritises initiatives, and propose		Draft capital investment framework.			

		institutional arrangements for MSDF implementation.					
6.4.	DRAFT IMPLEMENTATION FRAMEWORK	Consolidate policies, guidelines, and investment priorities into a MSDF implementation framework.	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; (v) specification, where necessary, of any arrangements for partnerships in the implementation process.	Draft implementation framework.	Endeavour to complete in order to contribute to: • Management budget workshop (week 1 Dec 2016.) • Adjustment budget (30 Dec 2016 - 31 Jan. 2017) • SDBIP amendments (30 Dec. 2016 - 31 Jan. 2017) • New budget (30 Dec. 2016 - 28 Feb. 2017)		
ROUND 3 STAKEHOLDER ENGAGEMENT: DRAFT MSDF							
	OPEN HOUSE	Conduct a public open house to present the draft MSDF/ implementation framework.	20 (3): Before adopting the MSDF, the Council must - (a) give notice of the proposed MSDF in the Gazette and the media; (b) invite the public to submit written representations to the	• Open house posters • Record of engagement	• Publicise draft IDP, budget, SDBIP (6 April 2017) • Ward based public participation (10 - 29 April 2017) • CAMAF participation (10 - 29 April 2017) • Consideration of public inputs at	April 2017	• MSDF service providers • Public and institutional stakeholders

			Council within 60 days after the publication of the notice referred to in paragraph (a); (c) consider all representations received in respect of the proposed MSDF.		budget steering committee (9 May 2017)		
	3rd PMT MEETING	Convene the 3 rd PMT to discuss project progress/ programme.		<ul style="list-style-type: none"> • Minutes • Record of engagement 			<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department/ PMT
	2nd ISC MEETING	<ul style="list-style-type: none"> • Convene the 2nd ISC meeting to present the draft MSDF/ implementation framework/ comments received. • Obtain endorsement of proposals/ implementation framework/ process moving forward. 		<ul style="list-style-type: none"> • Presentation • Record of engagement 			<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department/ PMT • ISC
ROUND 3 MONITORING AND EVALUATION: DRAFT MSDF							
	TARGET MEASUREMENT ALIGNMENT	<ul style="list-style-type: none"> • Align the targets of the policies in the implementation framework with the monitoring and evaluation targets. • Align the targets of the guidelines in the implementation framework with the monitoring and evaluation targets. • Align the targets of the institutional requirements in the implementation 		<ul style="list-style-type: none"> • Policy targets. • Guideline targets. • Institutional targets. 		May 2017	<ul style="list-style-type: none"> • MSDF service providers • Municipal Planning Department

		framework with the monitoring and evaluation targets.					
7.	PHASE 7: FINAL MSDF						
7.1.	FINAL MSDF	<ul style="list-style-type: none"> Refine, update and finalise the draft MSDF/ implementation framework based on stakeholder engagement. Prepare summary brochures, pamphlets or posters of the key spatial proposals. Submit final MSDF report to local municipal officials/ Council for approval. 	21 (b): A MSDF must include a written and spatial representation of a five-year spatial development plan for the spatial form of the municipality.	MSDF final report (including Executive Summary, brochures, pamphlets, posters, etc.).	<ul style="list-style-type: none"> Finalisation of budget/ IDP amendments/ refinements (16 May 2017) Submission of budget/ IDP to Council for approval (23 May 2017) Public notice of approved budget/ IDP 	May 2017	<ul style="list-style-type: none"> MSDF service providers Municipal Planning Department
7.2.	SECTOR PLAN ALIGNMENT	Facilitate follow-up discussions with the relevant municipal departments to discuss required alignment interventions to ensure that the MSDF proposals are incorporated into all relevant sector plans.	21 (m): Provide the spatial expression of the coordination, alignment and integration of sectoral policies of all municipal departments.	Sector plan alignment proposals and discussions			
7.3.	PRIORITY LOCAL PLANS	Initiate the delineation and implementation of required local area plans or precinct plans as set out into the capital investment framework.	21 (l): Identify the designation of areas in which: (i) more detailed local plans must be developed; (ii) shortened land use; development procedures may be applicable and land use schemes may be so amended.	Identified and delineated local plans/ precinct plans			
7.4.	CAPITAL INVESTMENT FRAMEWORK	Ensure that key proposals contained in the capital investment	21 (n): Determine a capital expenditure framework for the	IDP and MSDF alignment			

	INCORPORATION IN IDP	framework is incorporated into IDP review.	municipality's development programmes, depicted spatially.	proposals/ discussions.			
7.5.	SECTOR PLAN ALIGNMENT	Facilitate discussions with municipal departments to discuss alignment between MSDF and all relevant sector plans.	20 (2): MSDF must be prepared as part of a municipality's IDP 21 (m): Provide the spatial expression of the coordination, alignment, and integration of sectoral policies of all municipal departments.	Sector plan alignment proposals/ discussions.			

ABBREVIATION	DESCRIPTION
AFS	ANNUAL FINANCIAL STATEMENTS
AG	AUDITOR GENERAL
CAM	CAPE AGULHAS MUNICIPALITY
CONSTITUTION	REPUBLIC OF SOUTH AFRICA CONSTITUTION ACT , ACT 108 OF 1996
DORA	DIVISION OF REVENUE ACT
IDP	INTEGRATED DEVELOPMENT PLAN
IDZ	INDUSTRIAL DEVELOPMENT ZONE
IGR	INTER GOVERNMENTAL RELATIONS
KPA	KEY PERFORMANCE AREAS
KPI	KEY PERFORMANCE INDICATORS
MFMA	LOCAL GOVERNMENT: FINANCIAL MANAGEMENT ACT, ACT 56 OF 2003
MIP	MUNICIPAL INFRASTRUCTURE PLAN
MSA	MUNICIPAL SYSTEMS ACT, ACT 32 OF 2000
MTAS	MUNICIPAL TURN AROUND STRATEGY
NDP	NATIONAL DEVELOPMENT PLAN: VISION FOR 2030
MSCOA	MUNICIPAL STANDARD CHARTER OF ACCOUNTS
ODM	OVERBERG DISTRICT MUNICIPALITY
SDBIP	SERVICE DELIVERY BUDGET IMPLEMENTATION PLAN
SDF	SPATIAL DEVELOPMENT FRAMEWORK
SPLUMA	SPATIAL PLANNING LAND USE MANAGEMENT ACT, ACT 16 OF 2003

