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# DRAFT IDP/BUDGET PROCESS PLAN 2020/21

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[Document subtitle]

# IDP PROCESS PLAN

IDP /BUDGET PROCESS PLAN FOR THE REVIEW OF 2019/20 AND DEVELOPMENT OF 2020/21 IDP AND BUDGET

It outlines the review process of the IDP, Stakeholders’ roles and responsibilities; and timeframes in relation to target timelines.

**Table A: Process Plan for Preparation of 2020/21 IDP/BUDGET**

01 PREPARATORY PHASE			
NO	DATES AND KEY DEADLINES	IDP,BUDGET(Mscoa) AND RISK MANAGEMENT ACTIVITIES	RESPONSIBLE DEPARTMENT OR OFFICE.
1.	26/06/19	Approval of SDBIP 28 days after approval of budget, and finalisation of strategic and operational risk register	Mayor.
2.	31/07/19	Finalization and signing of performance agreements (by senior managers)including risk management responsibilities in performance management agreements	Municipal Manager & Corporate Services
3.	02/07-31/07/19	Development of draft IDP process plan downloading of latest Mscoa chart for implementation by October/November 2019 for use in budget compilation.  Identification and schedule key risk management activities aligned to budgetary processes.  Unpack operation and maintenance projects and all new capital projects into the Mscoa project segment.	Municipal manager Planning, BTO and technical services.
4.	03/07/19	Consolidation of all the planning information	Planning& BTO
5.	09/07/19	Draft process plan submitted to IDP and Budget Steering Committee (management)	Municipal manager

6.	22/07/19	Draft process plan submitted to Portfolio Committee	Municipal manager
7.	24/07/19	Draft process plan submitted to EXCO	Municipal manager
8.	21/07/19	Draft process plan circulated to MDM for comments	Planning and BTO
9.	25/07/19	Draft process plan circulated to all stakeholders	IDP Office
10.	26/07/19	Final Process Plan submitted council	Municipal manager
11.	26/07/19	Final IDP/Budget Process plan to submitted to council for approval	Council services
<b>02 ANALYSIS AND STRATEGY DEVELOPMENT PHASE</b>			
12.	02-27/08/2019	Confirmation and analysis of community needs submitted previous financial year and using of Statssa information	IDP office
13.			
14.	02/08/ to 31/08 2019	Draft analysis phase shared with CDW's on updating of Ward Profiles	Planning
15.	02/08/2019-30/11/2019	Updating of Ward Profiles	Planning
16.	20/08/2019	Review of quantitative analysis per Sector	IDP office
17.	21/08/2019	Submission of reviewed analysis to IDP	All Departments
18.	07/08/19 12/08/19 19/08/19	Management meeting Portfolio committee meeting EXCO meeting	Municipal manager

19.	27/08/19	Submission of Annual performance report and AFS to audit committee for review	Audit committee
20.	31/08/19	Submission of APR and AFS to AGSA	Municipal manager
21.	09-10/09/19	District engagement session for mopani	IDP office
22.	09/09/19 16/09/19 20/09/19	Management meeting Portfolio committee meeting EXCO meeting	Municipal manager
23.	25/09/19	Distribution of analysis information to all internal department for confirmation	Planning
24.	26/09/19	Internal department give inputs to the analysis information	IDP office
25.	27/09/19	Conducting of snap survey on the level of services offered by the municipality	IDP office
26.	01/10/19	Finalisation of analysis phase	IDP office
27.	08/10/19 14/10/19 18/10/19 30/10/19	Draft Analysis Phase presented to management Draft presented to portfolio committee Draft presented to EXCO 1 <sup>st</sup> quarter council meeting	Municipal manager
28.	29/11/19	Consolidation of all relevant information	Municipal manager, a Planning and BTO

29.	01/11/19	Summarising all the issues identified in the analysis's phase	Planning
30.	04-05/11/19	District engagement session	Planning
31.	02/11-31/12/19	Development of draft objectives, strategies ,vision and mission and aligning with all planning document NDP,SDF,LUS ,LDP	Planning
32.	06/12/19 10/12/19 13/12/19	Management Portfolio committee EXCO	Municipal
33.	02/12/2019-29/02/20	Preparation of revenue and expenditure projections and budget preparation  Compilation of detailed budgets Mscoa classification across all segments 2019/20( MTREF)  Review of operational risks and assessing of budget allocation in line with priorities and key risks identified	Municipal manager, planning and BTO
34.	29-31 /01/20	Strategic planning session to review objectives,vision,Values and strategies	Municipal manager and planning
<b>03 PROJECT PHASE</b>			
35.	01/01/2020-31/01/20	1) Review past performance (financial & non-financial): Analysis of current reality including basic facts and figures  2) Analysis of infrastructure and current service delivery level.	<ul style="list-style-type: none"> <li>• Municipal Manager &amp; all senior managers</li> <li>• MM/Technical Services Manager.</li> </ul>

36.	09/01/2020  25/01/2020	1. IDP /Budget steering committee( preparation for public participation on draft project, request community needs and feedback on performance(SDBIP)  2. Submission of mid-year performance assessment to council and tabling of annual report.	• All managers  Municipal Manager
37.	08/01/2020 13/01/2020 20/01/2020 29/01/2020	Management Portfolio committee's EXCO Council (2 <sup>nd</sup> quarter) tabling of annual report	All managers All Councillors
38.	21/01/2020/08/02/20	Identification of projects (own, MIG, Grant Funding and Sector Departmental Projects.	IDP, Management.
39.	01-15/02/2020	Mid-year budget assessment	Treasury
40.	03/02/2020	District engagement session	planning
41.	07/02/2020 12/02/2020 19/02/2020	Management. Portfolio committee EXCO	Municipal manager

	26/02/2020	Council (budget adjustment)	
42.	07/02/2020	prioritization of project and integrating all provincial and national departmental projects	Management
<b>04 INTEGRATION PHASE</b>			
43.	01/02/20-31/03/2020	Review of sector Plans and Policies Progress report to be done at all portfolio meetings throughout the year e.g <ul style="list-style-type: none"> <li>• LED strategy</li> <li>• Disaster management plan</li> <li>• Spatial Development Framework</li> <li>• Environmental Plan</li> <li>• All financial policies</li> <li>• Institutional Plan</li> <li>• By-laws</li> <li>• Policy review session</li> </ul>	All managers and executive committee and labour.  All Councillors
<b>05 APPROVAL PHASE</b>			
44.	10/03/2020	Management (draft budget and IDP)	Municipal manager
	16/03/2020	Joint Portfolio committee's(draft budget and IDP	Planning and budget and treasury office

	20/02/2020 27/03/2020	EXCO(draft budget and IDP Council (adoption of 2020/21 draft IDP and budget, final adoption of oversight report Table Mscoa complaint A1 schedule format and upload data string on portal Risk awareness and tabling of the risk policies and draft risk register to council	Mayor Speaker
45.			
46.	14/03/2020	Briefing of internal stakeholders on draft IDP/budget	
47.	19/03/20	Presentation of draft IDP/Budget to IDP REP forum	BTO & Planning
48.	08/04/20 17/04/20 21/04/20 28/04/20	Management Portfolio committees EXCO Council third quarter 18/19	Municipal manager
49.	06/04/20	Advertise for 21 days in the local and national news paper	Planning and BTO
50.	08/04/20	Draft IDP/ Budget 2019/20 submitted to COGHSTA ,PT,COGTA and NT	Municipal manager
51.	13/04/20-30/04/20	Conduct public participation on draft IDP/Budget for 2020/2021	Planning, BTO and corporate services
52.	08/05/20 13/05/20 21/05/20	Management Joint Portfolio committees EXCO	Municipal Manager Planning and budget and finance portfolio Mayor.



	28/05/20	<p>Council (special council meeting to adopt final IDP/Budget)</p> <p>Upload Mscoa and data string on the final IDP and budget</p> <p>Council approves the risk and fraud prevention policies</p>	
53.	18/05/20	Final IDP/ Budget presented to IDP REP forum	Planning and BTO
54.	03/06/20	Final IDP/ Budget 2019/20 submitted to relevant provincial , national COGTA and national treasury	Municipal manager
55.	08/06/20	Publication of the IDP on Municipal Website, Within 14 days after adoption and local and national newspaper	Planning and BTO
56.	09/06/20 13/06/20 19/06/20	<p>Management</p> <p>Portfolio committee's</p> <p>EXCO</p>	Municipal manager
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