

2023/2024

umhlabuyalingana  
Municipality



# IDP/BUDGET/ SDF AND OPMS PROCESS PLAN

# UMHLABUYALIQANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## SECTION 1:

### (a) INTRODUCTION

Integrated Development Planning Process:

The Integrated Development Planning process is a continuous cycle of planning, implementation, formulation and review. All municipalities are expected to formulate their Integrated Development Plans (IDP) for each every five years and these IDPs are then reviewed annually (financial year).

In November 2021 elections, the municipality was engaged in a new 5 year IDP cycle. After these elections a new IDP was developed and it will come to an end in year 2026/2027. IDP implementation programme is monitored to identify if the Organizational objectives, Key Performance Indicators and Targets are being achieved. Monitoring also involves gathering of information on changing circumstances in different situations such as:

- Baseline data and demographics,
- New policy legislation,
- Corporate development,
- Sector departments,
- New investments opportunities,
- Sector development plans,
- Changes in the existing situation due to unexpected events such as natural disasters,
- Input from stakeholder organizations and constituencies,
- Budget information in compliance with mSCOA from other spheres of government as well as municipal budget review process,
- More or improved in-depth information about new developments and trends.

The Municipal Systems Act requires that each municipality, before the drafting of the IDP, prepare a process plan indicating:

- Roles and Responsibilities and responsible persons
- A description of the organizational arrangements to be established including the terms of reference,

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

- An action programme with activities and horizontal alignment, binding legislation and planning requirements and the cost estimates for the whole review process,
- Mechanisms and procedures for public participation.

### **(b) LEGISLATIVE REQUIREMENTS FOR IDP REVIEW**

The preparation of an IDP Process Plan is referred to in Chapter 5, Section 28 of the Municipal Systems Act, 32 of 2000 as follows:

*(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 and 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.*

In order to ensure certain minimum quality standards of the IDP process, and a proper coordination between and within spheres of government, the preparation of the Process Plan has been regulated in the MSA. The preparation of a Process Plan, which is in essence the IDP Review Process set in writing, requires adoption by Council. This plan has to include the following:

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

# UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## **BUDGET PREPARATION**

Municipal Finance Management Act, Act 56 of 2003

### **© KEY ELEMENTS TO BE ADDRESSED DURING THE REVIEW PROCESS**

Umhlabuyalingana Municipality will for the 2023/2024 IDP review address amongst other issues the following.

- MEC panel comments for 2022/2023 IDP
- New council priorities
- Outcome based approach ( cabinet Lekgotla Resolutions, District Lekgotla Resolutions,, OPMS, State of the Nation Address, State of the Province Address, PGDS and PDP, Outcome 9, MTAS, COP17
- The Sukuma Sakhe/War on Poverty and War Rooms
- The Updating of the SDF and
- Ensure that the IDP is Aligned to the SDF

### **MSCOA Compliance**

The Minister of Finance has, in terms of section 168 of the Local Government: Municipal Finance Management Act, 2003 (Act No.56 of 2003), and acting with the concurrence of the Minister of Cooperative Governance and Traditional Affairs gazetted the Municipal Regulations on Standard Chart of Accounts (mSCOA) into effect on 22 April 2014. Municipal SCOA provides a uniform and standardised financial transaction classification framework. Essentially this means that mSCOA prescribes the method (the how) and format (the look) that municipalities and their entities should use to record and classify all expenditure (capital and operating), revenue, assets and liabilities, policy outcomes and legislative reporting. This is done at transactional level and ensures that a municipality and its entities have minimum business processes in place. This will result in an improved understanding of the role of local government in the broader national policy framework and linkage to other government functions.

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

The Regulations apply to all municipalities and municipal entities and indicate its applicability and relevance to each specific municipal environment while accommodating organisational uniqueness and structural differences. The Regulation provided for a three year preparation and readiness window and all 278 municipalities must be compliant to the mSCOA classification framework which was set for 1 July 2017.

Chapter 6 of the MFMA tasks the Municipal Manager of the municipality with managing the financial administration of the municipality. Since mSCOA is a municipal business reform, the Municipal Manager has the overall responsibility to manage the successful implementation of the mSCOA project within the municipality, to ensure the municipality is able to capture all transactions (at posting level) in accordance with mSCOA within its respective financial applications (systems) by 1 July 2017 going forward.

### **MSCOA TERMS OF REFERENCE**

The mSCOA Steering Committee of the municipality should be multi-disciplinary and include members of top management, including the following functions and skills:

- Finance and Budgeting
- Management
- Risk management;
- Engineering; Technical and Planning
- Information technology
- Human resources.
- Community
- Local Economic Development

Representatives, at the appropriate senior level, of all departments should also be represented on the Steering Committee, which should be chaired by the Municipal Manager or a Project Sponsor, duly assigned the role in writing. Committee members' should be assigned in writing to the Steering Committee and their performance agreements amended to accommodate these responsibilities.

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

### **Composition of the MSCOA Steering Committee:**

The mSCOA Steering Committee appointed by Accounting Officer

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

<b>Chairperson</b>	<b>The Accounting Officer</b>
<b>Secretariat</b>	
<b>Members</b>	
<b>Acting Chief Financial Officer</b>	Mrs NP Mkhabela
<b>Acting Director Community Services</b>	Mrs NF Mngomezulu
<b>Acting Director Corporate Services</b>	Mr TS Mkhabela
<b>Director Technical Services</b>	Vacant
<b>IDP Manager</b>	Mr NM Mthembu
<b>Risk and Compliance Manager</b>	Mrs TP Nhlenyama
<b>Internal Auditor</b>	Ms K Bhengu
<b>Deputy Director Corporate Services</b>	Mr TS Mkhabela
<b>Deputy Chief Financial Officer</b>	Mrs NP Mkhabela
<b>Fleet Manager</b>	Mr S Bhengu
<b>Fleet Officer</b>	Mr VB Mbonambi
<b>Human Resource Manager</b>	Ms L Sithole
<b>Deputy Director Community Services</b>	Vacant
<b>Deputy Director Technical Services</b>	Mr SN Zikhali
<b>LED/Tourism Manager</b>	Mrs N Bukhosini
<b>SCM Manager</b>	Mr NM Mthembu
<b>Budget and Reporting Manager</b>	Mrs FXH Khumalo
<b>Waste Manager</b>	Mrs NF Mngomezulu
<b>Technical Manager</b>	Mrs F Msabala
<b>Planning and Development Manager</b>	Ms Z Macingwana
<b>PMS Manager</b>	Mr NJ Mpontshane
<b>Strategic Manager</b>	Mr MS Mnguni
<b>Library Manager</b>	Ms SF Ndlazi
<b>IT Manager</b>	Mr MS Ngubane
<b>IT Officer</b>	Mr TI Mokoatle
<b>Senior Technical Officer</b>	Mrs TL Masinga
<b>Budget and Reporting Officer</b>	Mrs N Zungu
<b>Youth Coordinator/Development</b>	Mr TS Gumede
<b>Special Programmes Manager</b>	Mr TD Mlambo
<b>Communication Officer</b>	Mr L Motha
<b>PMS Officer</b>	Ms NP Makhathini
<b>Public Safety Manager</b>	Mr SL Mahaye
<b>Law Enforcement Services Superintendent</b>	Mr B Zisongo
<b>Licensing Superintendent</b>	Mrs SB Nxumalo
<b>SCM Officer</b>	Mr SS Mhlongo
<b>Disaster Management Officer</b>	Mr L Dangele
<b>OHS Officer</b>	Ms L Ngubane
<b>Accountant Revenue Officer</b>	Mrs SN Ntombela
<b>Accountant Expenditure Officer</b>	Mrs GD Nsibande
<b>Payroll Officer</b>	Vacant
<b>Waste Officer</b>	Mr S Mazibuko

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

<b>Community Facilities Officer</b>	Vacant
<b>Contract Management Officer</b>	Ms N P Jali
<b>Human Resource Officer</b>	Ms N Mathe
<b>Committee Officer</b>	Mr B K Thwala

### SECTION 2: ORGANISATIONAL ARRANGEMENTS

#### 2. The IDP Manager:

- **Functions of the IDP Manager**

- Responsible for the participation of the IDP Process Plan
- Responsible for the day to day management of the IDP review process and the allocation of resources, time, people, thereby ensuring:
  - Involvement of all different role-players, especially councillors and officials.
  - The allocation of the roles to officials,
  - Conditions for participation are conducive,
  - That the time-frames are adhered to,
  - That the participatory, strategic, implementation oriented and sector planning requirements are compiled with,
  - That information is gathered, collated and evaluated and properly documented,
  - That the information obtained receives attention during the IDP process,
  - That the review process is horizontally and vertically aligned and complies with national and provincial requirements,

#### 2. The IDP/Budget Steering Committee

The IDP/Budget Steering Committee must be established during the IDP process and it must continue performing its functions during the IDP review process. It is a technical working group made up of senior officials and relevant officials to support the IDP Manager and budget officer and ensure a smooth review process. The Mayor chairs the IDP/ Budget Steering Committee and the secretarial duties performed by the municipal officials of Umhlabuyalingana Municipality.



## UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

### **Terms of Reference for the Umhlabuyalingana IDP/Budget Steering Committee:**

- To act as a secretariat for the IDP Representative Forum
- To ensure alignment at a district and local level,
- To support the IDP Manager,
- To support and advise the IDP Representative Forum on technical issues,
- To make content recommendations,
- To prepare facilitate and document meetings,
- To commission relevant and appropriate research studies during the IDP and budget process,
- To consider and comment on the inputs the consultants, study teams, task departments and service providers,
- Processing, summarising and documentation of project outputs,

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

### **Composition of the IDP/BUDGET Steering Committee:**

The IDP/Budget Steering Committee is composed of the following:

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

<b>Chairperson</b>	<b>The Mayor</b>
<b>Secretariat</b>	Municipal official
<b>Members</b>	
<b>Acting Municipal Manager</b>	Mr NPE Myeni
<b>Director Technical Services</b>	Vacant
<b>Acting Chief Financial Officer</b>	Mrs NP Mkhabela
<b>Acting Director Community Services</b>	Mrs NF Mngomezulu
<b>Acting Director Corporate Services</b>	Mr TS Mkhabela
<b>IDP Manager</b>	Mr NM Mthembu
<b>Strategic Manager</b>	Mr MS Mnguni
<b>Risk and Compliance Manager</b>	Mrs TP Nhlenyama
<b>Internal Auditor</b>	Ms K Bhengu
<b>Deputy Director Corporate Services</b>	Mr TS Mkhabela
<b>Deputy Chief Financial Officer</b>	Mrs NP Mkhabela
<b>Fleet Manager</b>	Mr S Bhengu
<b>Deputy Director Community Services</b>	Vacant
<b>Deputy Director Technical Services</b>	Mr SN Zikhali
<b>LED/Tourism Manager</b>	Mrs N Bukhosini
<b>Human Resources Manager</b>	Ms L Sithole
<b>SCM Manager</b>	Mr NM Mthembu
<b>Budget and Reporting Manager</b>	Mrs FXH Khumalo
<b>Finance Manager</b>	Mr S.M. Ngubane
<b>Waste Manager</b>	Mrs. NF Mngomezulu
<b>Technical Manager</b>	Mrs F Msabala
<b>IT Manager</b>	Mr MS Ngubane
<b>Planning and Development Manager</b>	Ms Z Macingwana
<b>Special Programmes Manager</b>	Mr TD Mlambo
<b>PMS Manager</b>	Mr NJ Mpontshane
<b>Library Manager</b>	Ms SF Ndlazi
<b>Youth Coordinator/ Development</b>	Mr TS Gumede
<b>Public Safety</b>	Mr SL Mahaye
<b>Communications Officer</b>	Mr L Motha
<b>Budget and Reporting Officer</b>	Mr N Zungu

The IDP/Budget Steering Committee has no decision-making powers, but act as an advisory body to the IDP Representative Forum.

# UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## ALLOCATION OF ROLES AND RESPONSIBILITIES

### (a) Role-Players

The involvement and participation of the following role-players will be crucial to the accomplishment of a participatory review process:

- All municipal Councillors
- The municipal council
- The Executive Committee
- The IDP Manager
- Municipal Manager
- The IDP/ Budget Steering Committee
- The IDP Representative Forum
- The District IDP Steering Committee
- Organised business structures
- Traditional Councils
- Sector Departments
- Ward Committees
- Municipal Officials
- Neighbouring Provinces
- NGOs and CBOs
- Local Farmers Association
- Organised Farm-workers structures
- Private sector

### (b) Internal role players: Roles and Responsibilities

- **Umhlabuyalingana Municipal Council**

Umhlabuyalingana Municipal Council is responsible for the following:

- Adoption of the IDP Process Plan
- Adoption and approval of the reviewed IDP,
- Amendment of the IDP in accordance with the comments by sector departments and MEC,
- Approval of the various review phases,
- Adoption of the mSCOA Action Plan
- Ensuring that the IDP is linked to the PMS and Municipal Budget

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

- **The Executive Committee:**

The Executive Committee has the following responsibilities:

- Recommend to Council the adoption of the IDP Process Plan and reviewed IDP.
- Overall management of the IDP Review process,
- Monitoring the IDP review process

- **The IDP Manager**

The IDP Officer is assigned the following responsibilities:

- Management and Co-ordination of the IDP process
- Ensure that there's vertical and horizontal alignment,
- Management of the consultants,
- Ensuring all stakeholders are informed of the process and their involvement,
- Create a conducive environment for public participation,

- **IDP/Budget Steering Committee**

The IDP Steering Committee is assigned the following responsibilities:

- Ensuring the gathering and collating of information while the IDP implementation is proceeding,
- Support the IDP Manager in the management and co-ordination of the IDP,
- Discussion of input and information for the IDP review,
- Ensuring the monitoring and evaluation of the gathered information,
- Attending to MEC's comments

### **SECTION3. EXTERNAL ROLE PLAYERS**

- **IDP Representative Forum**

The IDP Representative Forum is assigned the following responsibilities:

- Recommend reports for approval / adoption,
- Representing interests of the constituents,
- Present a forum for communication and participation for all stakeholders,
- Monitoring the IDP review process.

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

- **Umkhanyakude District Municipality Planning and Development Forum**

The Umkhanyakude District Municipality forms a district-wide Planning and Development Forum for the purpose of alignment with all the local municipalities within the district:

- **Municipal Officials**

The municipal officials are responsible for the implementation of the IDP and in the process gather information on any changes in the circumstances. They have to provide budgetary information and any information on the performance evaluation. They provide technical expertise during the planning process. Municipal Officials also interact with the Ward Councillors and Ward Committees and provide guidance and advice that is crucial during the IDP process.

- **Ward Committees**

The Ward Committees have a crucial role of identifying the needs and service delivery gaps in the community and report to the Ward Councillor.

- **Sector Departments**

The Sector Departments have the following responsibilities:

- Assist in the IDP formulation and review process,
- Provide budget information and sector plans,
- Provide data and information,
- Ensure programme and project alignment between the municipality and province,
- Ensure budgetary alignment between provincial programmes and projects and the municipality's IDP.

- **Ward Councillors**

Ward Councillors are an important link between the municipality and the constituents. They are the first to know of any community needs or service delivery gaps. The Councillors will be responsible for forwarding this information to the municipal officials. They are also responsible for organizing community meetings and ensuring maximum participation of residents in the IDP review process.

- **Traditional Councils**

The Traditional Councils will work as a link between the community and Ward Councillors and matters of service delivery and needs of the people. Assist in giving information with regard to land rights and possible available areas for future development.

# UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## **The IDP Representative Forum**

This is the structure, which institutionalises and ensures a participatory IDP review process. It represents the interests of the constituents of the municipality in the review process. It is envisaged that all organisations, stakeholders or interest groups are represented in the forum.

### **Terms of Reference for the IDP Representative Forum:**

- To monitor performance and implementation of the IDP
- To ensure alignment takes place at the various levels,
- To represent the interest of the constituents in the IDP process,
- To provide input on new strategies and discuss changes to circumstances,
- To provide a forum and a mechanism for discussion, debate and agreement on development planning and progress on the IDP implementation,
- To ensure communication between all the stakeholders in the IDP process.

### **Composition of the IDP Representative Forum:**

**Chairperson: The Mayor**

**Secretariat : Umhlabuyalingana IDP Steering Committee**

**Members : All Municipal Councillors**  
: **The Executive Committee**  
: **Councillors and Officials from Umkhanyakude District**  
: **Municipal Manager and Municipal Officials**  
: **Traditional Leaders within Umhlabuyalingana Municipality**  
: **Ward Committees Representatives**  
: **Community Development Workers (CDWs)**  
: **Parastatals and Service Providers**  
: **NGOs and CBOs**  
: **Sector Departments**  
: **Neighbouring Municipalities**  
: **Neighbouring Countries**  
: **Farmers Associations**  
: **Traditional Healers**  
: **Churches**  
: **Private sector**

The IDP Representative Forum will meet according to the action programme and as when there is a need.

# UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## SECTION 4: MECHANISMS FOR PUBLIC PARTICIPATION

### 1. Context of Public Participation

It appears in Chapter 4 of the Municipal Systems Act, Act 32 of 2000 that a municipality must encourage and create conditions for the local community to participate in the affairs of the municipality, including in the preparation and implementation of its Integrated Development Plan. In this context, the municipality has committed to a participatory process of IDP whereby the community will play a meaningful role.

### 2. Mechanisms for Public Participation

The following mechanisms will be used for participation:

- **Mayoral IDP Road Show**  
UMhlabuyalingana Municipality will use mayoral roadshow to enhance public participation
- **Ward IDP Consultative meetings**  
The municipality has 18 wards and will engage all 18 wards for a meaningful participation in the process.
- **Breakfast meeting**  
The municipality will timeously have breakfast meeting as measure for to maximise participation.
- **IDP Representative Forum**  
This forum should represent all stakeholders and be as inclusive as possible and it must meet as the action programme.
- **Media**  
Municipal web site, brochures, Local newspapers circulating within the municipal area of jurisdiction will be used to inform on progress and issuing public notices on the IDP and Budget processes. The local / community Radio Stations will also be utilised for publicity purposes.
- **Ward Committees and Community Development Workers**  
As formal structures established in terms of the Municipal Structures Act, the Ward Committees and Ward Councillors will be used as a link between the municipality and communities, to obtain information on any other information on progress on the IDP and Budget implementation.



# UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

- **Municipal Notice Boards**

The municipal notice boards, library notice board and traffic station notice board will be used to inform stakeholders of crucial meetings.

## SECTION 5: MECHANISMS ON ALIGNMENT

### 1. Alignment between National and Local Government

Umhlabuyalingana Municipality will endeavour to align the IDP and Budget review process with relevant national legislation, policies, programmes (CBPWP, NDP, ISRDP, Urban Renewal Programme, etc.) and financial plans (e.g. MTEF, MTEP)

### 2. Alignment between Provincial and Local Government

Alignment between the province and the municipality will occur at the IDP Representative Forum. The process will have to be able to integrate the plans, programmes and budgets of the Provincial Sector Departments into the Municipal IDP this include alignment with PGDS.

### 3. Alignment between District and Local Municipality

Alignment at this level will be co-ordinated at the Umkhanyakude District Municipality's Planners forum. The main function of the Forum is to monitor progress in the various review processes and to ensure alignment between the district and the local municipality in terms of the framework plan.

### 4. Alignment at Local Municipal Level

The Municipal Manager/IDP Manager with the support of the IDP Steering Committee will ensure that all the role-players are performing their duties. Performance in terms of expected roles and responsibilities will be monitored at the Steering Committee meetings and corrective measures be taken should there be unsatisfactory performance.

The alignment with other border municipalities i.e Jozini and The Big Five False Bay should be strengthened.

### 5. Alignment between Countries

Since Umhlabuyalingana Municipality is located at the South Africa – Mozambique and Swaziland border it is crucial to identify competitive advantages of this positioning of the municipal

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

countries we therefore will take advantage of existing programme like TFCA with is aimed at creating link between these three.

## SECTION 6: ACTION PROGRAMME AND TIME FRAMES

The methodology to be followed in the IDP and budget processes is as follows:

- Phase 1: - Preparing for IDP / Formulation**
- Phase 2: - Gathering of Information**
- Phase 3: - Assessment and Evaluation of Information**
- Phase 4: - Aligning IDP, Budget, SDF and PMS**
- Phase 5: - Adoption of IDP**

### PHASE 1: PREPARATION FOR IDP/ANALYSIS

- Preparation of Process Plan
- Discussing the IDP Process Plan at the Steering Committee
- Adoption of Process Plan by Council
- Submission of Process Plan to Umkhanyakude and Advertising

#### **Time frame: July 2022- September 2022**

(18/07/2022): Housing Forum)  
(22/07/2022: EXCO Meeting)  
(29/07/2022: Special Council)  
(05/08/2022: Housing Forum)  
(15/08/2022: IDP/Budget Steering Committee Meeting)  
(25/08/2022: EXCO Meeting)  
(31/08/2022: Special Council Meeting)  
(21/09/2022: IDP Representative Forum)  
(22/09/2022: EXCO Meeting)  
(30/09/2022: Ordinary Council Meeting)

### PHASE 2: GATHERING OF INFORMATION

Collection and collation of new information on project implementation and performance targets e.g. Implementation management information about achievement or non-achievement of Objectives, KPIs and Targets and Changes in priority issues.

Any new information generated from internal and external sources e.g. municipal officials, stakeholders, sector departments, service providers etc.

Identify sector plans that needs to be integrated in the plan

Collate information Steering Committee, IDP Representative Forum and Public

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

Participation

UMkhanyakude Planning and Alignment Meeting

## **Time Frame: September 2022 – December 2022**

(04/10/2022: Housing Forum)

(06, 07, 18, 19 October 2022: IDP Review Community Meetings  
and SDF Public Participation Meetings)

(20/10/2022: EXCO Meeting)

(27/10/2022: Special Council Meeting)

(24/11/2022: EXCO Meeting)

(12/12/2022: EXCO Meeting)

(12/12/2022: IDP/Budget Steering Committee Meeting)

(14/12/2022: Ordinary Council Meeting)

## **PHASE 3: ASSESSMENT AND EVALUATION OF INFORMATION**

Prepare a summary document that contains information in terms of its relevance, Prepare a report on financial changes due to budget review and MIG allocations

Draft proposed changes and new information sections of the IDP.

IDP Steering Committee and EXCO Meetings Publicize the proposed changes to IDP on 21 day inspection

## **Time Frame: January 2023 – March 2023**

(16, 17, 18, and 19 January 2023: Annual Report)

(20/01/2023: EXCO Meeting)

(24/01/2023: Housing Forum)

(25/01/2023: Special Council)

(03/02/2023: Housing Forum)

(09/02/2023: IDP/Budget Steering Committee Meeting)

(14/02/2023: IDP Representative Forum Meeting)

(20/02/2023: EXCO Meeting)

(24/02/2023: Special Council Meeting)

(23/03/2023: EXCO Meeting)

(31/03/2023: Ordinary Council Meeting)

## **PHASE 4: IDP, Budget, SDF and PMS alignment**

Incorporate comments from all stakeholders

Incorporate completed sector plans

Draft IDP

Distribute IDP to Councilors and Officials for comments

Conduct IDP Steering Committee and IDP Representative Forum meeting.

Submission of Draft IDP to Province for assessment

## **April 2023 – June 2023**

(18, 19, 20, 25 April 2023: IDP/Budget Public Participation Meeting)

(21/04/2023: EXCO Meeting)

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

(26/04/2023: Special Council Meeting)  
(05/05/2023: Housing Forum)  
(25/05/2023: EXCO Meeting)  
(31/05/2023: Special Council Meeting)  
(22/06/2023: EXCO Meeting)  
(30/06/2023: Ordinary Council Meeting)

## PHASE 5: APPROVAL OF THE FINAL IDP

Submission of the IDP to the IDP Steering Committee and Representative Forum.  
Public comments Approval by the Executive Committee, Adoption by Council,  
Submission of Final IDP to both Province and uMkhanyakude.

### Important dates

EVENT	DATE	TIME	VENUE
EXCO MEETING	23/07/2022	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	30/07/2022	TBC	MUNICIPAL CHAMBER
IDP/BUDGET STEERING COMMITTEE MEETNG	23/08/2022	9H00	MUNICIPAL OFFICES
EXCO MEETING	26/08/2022	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	30/08/2022	TBC	MUNICIPAL CHAMBER
IDP/BUDGET REPRESENTATIVE FORUM	06/09/2022	10H00	MUNICIPAL OFFICES
PLANNERS AND DEVELOPMENT FORUM	07/09/2022	10H00	VIRTUAL PLATFORMS
EXCO MEETING	22/09/2022	TBC	MUNICIPAL CHAMBER
ORDINARY COUNCIL MEETING	30/09/2022	TBC	MUNICIPAL CHAMBER
IDP REVIEW PUBLIC PARTICIPATION	06/10/2022	10H00	CLUSTER 1
IDP REVIEW PUBLIC PARTICIPATION	07/10/2022	10H00	CLUSTER 2
IDPREVIEW PUBLIC PARTICIPATION	08/10/2022	10H00	CLUSTER 3
IDP REVIEW PUBLIC PARTICIPATION	20/10/2022	10H00	CLUSTER 4
EXCO MEETING	21/10/2022	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	28/10/2022	TBC	MUNICIPAL CHAMBER
PLANNERS AND DEVELOPMENT FORUM	19/11/2022	10H00	VIRTUAL PLATFORMS
EXCO MEETING	26/11/2022	TBC	MUNICIPAL CHAMBER
IDP/BUDGET STEERING COMMITTEE MEETNG	12/12/2022	9H00	MUNICIPAL OFFICES
EXCO MEETING	13/12/2022	TBC	MUNICIPAL CHAMBER
ORDINARY COUNCIL MEETING	15/12/2022	TBC	MUNICIPAL CHAMBER
STRATEGIC MEETING	TBC	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	10/01/2023	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	11/01/2023	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	12/01/2023	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	13/01/2023	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	14/01/2023	TBC	TBC
EXCO MEETING	20/01/2023	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	25/01/2023	TBC	MUNICIPAL CHAMBER
BSC MEETING	01/02/2023	10H00	MUNICIPAL OFFICES
ANNUAL REPORT PUBLIC PARTICIPATION	01/02/2023	TBC	TBC

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

ANNUAL REPORT PUBLIC PARTICIPATION	02/02/2023	TBC	TBC
ANNUAL REPORT PUBLIC PARTICIPATION	03/02/2023	TBC	TBC
IDP REPRESENTATIVE FORUM	15/02/2023	10H00	MUNICIPAL OFFICES
EXCO MEETING	17/02/2023	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	24/02/2023	TBC	MUNICIPAL CHAMBER
BSC MEETING	01/03/2023	10H00	MUNICIPAL OFFICES
EXCO MEETING	24/03/2023	TBC	MUNICIPAL CHAMBER
PLANNERS AND DEVELOPMENT FORUM	29/03/2023	10H00	VIRTUAL PLATFORMS
ORDINARY COUNCIL MEETING	31/03/2023	TBC	MUNICIPAL CHAMBER
IDP/BUDGET CONSULTATIVE MEETING	19/04/2023	10H00	CLUSTER1
IDP/BUDGET CONSULTATIVE MEETING	20/04/2023	10H00	CLUSTER2
IDP/BUDGET CONSULTATIVE MEETING	21/04/2023	10H00	CLUSTER3
EXCO MEETING	25/04/2023	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	29/04/2023	TBC	MUNICIPAL CHAMBER
BSC MEETING	03/05/2023	10H00	MUNICIPAL OFFICES
IDP STEERING COMMITTEE MEETING	05/05/2023	09H00	MUNICIPAL OFFICES
IDP REPRESENTATIVE FORUM	18/05/2023	10H00	MUNICIPAL OFFICES
PLANNERS AND DEVELOPMENT FORUM	19/05/2023	10H00	VIRTUAL PLATFORMS
EXCO MEETING	26/05/2023	TBC	MUNICIPAL CHAMBER
SPECIAL COUNCIL MEETING	31/05/2023	TBC	MUNICIPAL CHAMBER
EXCO MEETING	23/06/2023	TBC	MUNICIPAL CHAMBER
ORDINARY COUNCIL MEETING	30/06/2023	TBC	MUNICIPAL CHAMBER

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

## Budget Process 2023-2024

Description	Responsibility	Quarter One		
		July 2022	August 2022	September 2022
<b>STAGE ONE Planning and Strategizing</b>	Mayor and Accounting Officer	<ul style="list-style-type: none"> <li>Commence planning for next three-year budget, reviews of IDP and budget policies and consultation in accordance with budget process co-ordination</li> <li>Review council delegations and budget time schedule for key deadlines</li> </ul>	<ul style="list-style-type: none"> <li>Commence process to review policies</li> <li>Table to council – Budget and IDP process plan</li> <li>Plan programme of internal and public meetings</li> <li>Advertise all Budget and IDP time schedule</li> <li>Determine strategic objectives for service delivery and development including backlogs for next three year budget including reviews of other municipal, provincial and National government sector and strategic plans</li> </ul>	<ul style="list-style-type: none"> <li>Implement Budget and IDP key deadlines</li> <li>Finalise the reviewing of budget related policies</li> <li>Consult on Tariffs, indigent, credit control</li> <li>Consider local, provincial, national issues and previous year's performance</li> </ul>
Quarter Two				
		October 2022	November 2022	December 2022
<b>STAGE TWO Preparation</b>	MAYOR, AO & CFO	<ul style="list-style-type: none"> <li>Commence Preparation of departmental</li> </ul>	<ul style="list-style-type: none"> <li>Commence community and stakeholder consultation</li> </ul>	<ul style="list-style-type: none"> <li>Finalise first draft of departmental operational</li> </ul>

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

		ntal operationa l plans and service delivery and budget implement ation plan aligned to strategic priorities in IDP and inputs from other stakeholde rs including governme nt and bulk service providers	process, review inputs, financial models, assess impacts on tariffs and charges and consider funding decisions including borrowings. <ul style="list-style-type: none"><li>Adjust estimates based on plans and resources.</li></ul>	I plans and service delivery and budget implement ation plan for review against strategic priorities.
<b>Quarter Three</b>				
<b>Descripti on</b>	<b>Responsibi lity</b>	<b>January 2023</b>	<b>February 2023</b>	<b>March 2023</b>
<b>STAGE THREE Tabling to council</b>	Mayor, AO and CFO	<ul style="list-style-type: none"> <li>Review all aspects of budget including any unforeseen and unavoidable expenditure in light of need for adjustment budget</li> <li>Table MID Year performance report, AG Report &amp; Annual</li> </ul>	<ul style="list-style-type: none"> <li>Table Adjusted Budget for 2022/2023, to council for approval(Schedule B format)</li> <li>Confirm 2023/2024 allocations from NT, PT &amp; district municipality and incorporate allocation to the draft budget</li> <li>Submit Adjusted Budget to NT &amp; PT</li> </ul>	<ul style="list-style-type: none"> <li>Print and Distribute all budget documents and supporting documents prior to the meeting</li> <li>Table to the council the draft annual budget &amp; supporting documents 2018/19</li> <li>Submit tabled annual budget to NT,&amp; PT</li> </ul>



## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

		<ul style="list-style-type: none"> <li>report to council</li> <li>Finalise detailed operating and capital budgets in the prescribed format incorporating National and Provincial budget allocations</li> </ul>	<ul style="list-style-type: none"> <li>Engagement meeting with Provincial Treasury to discuss Mid-Year Assessment report</li> </ul>	
<b>Quarter Four</b>				
<b>Description</b>	<b>Responsibility</b>	<b>April 2023</b>	<b>May 2023</b>	<b>June 2023</b>
<b>STAGE FOUR Approving and Finalising</b>	Mayor, AO and CFO	<ul style="list-style-type: none"> <li>Advertise tabled annual budget</li> <li>Commence consultation process on annual budget 2023/2024</li> <li>Publish ward base information for ward councillors</li> <li>Conclude consultation process</li> <li>Revise annual budget after consultation, take into account third quarter report</li> </ul>	<ul style="list-style-type: none"> <li>Prepare the final budget document for final approval by the council</li> <li>Print and distribute the ALL budget documentation including, Draft IDP, SDBIP and performance contracts prior to the meeting at which budget is to be approved</li> <li>Consider approval of annual budget</li> <li>Engagement meetings with Provincial Treasury to</li> </ul>	<ul style="list-style-type: none"> <li>Approve annual budget by a council resolution, including taxes, tariff, measurable performance objectives, changes in IDP and budget related policies, service delivery agreements and long term contracts</li> <li>Submit approved annual budget to NT &amp; PT</li> </ul>



## UMHLABUYALINGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

		(section 52 )	assess budget processes for 2023/2024.	<ul style="list-style-type: none"> <li>• Submit Municipal Banking Details to NT</li> <li>• Advertise the final budget, SDBIP &amp; performance agreements in the municipal website</li> </ul>
--	--	---------------	--	---

### IDP/BUDGET PUBLIC PARTICIPATION BUDGET ALLOCATION

uMhlabuyalingana Municipality has identified and clustered its community for the IDP processes into four clusters according to its four traditional councils i.e. Tembe Traditional Authority, Mashabane Traditional Council, Mabaso Traditional Council and Mbila Traditional Council. There is an allocated budget of **R3 910 000** for IDP/ Budget and annual report public consultation and participation meetings. Below is the budget to be used.

ITEM	BUDGET ALLOCATED
IDP/BUDGET AND ANNUAL REPORT PUBLIC CONSULTATIVE AND PARTICIPATION MEETINGS	<b>R3 910 000</b>

### SECTION 7

#### IDP, PMS and Budget Broad Action Plan

1 <sup>st</sup> Quarter	IDP	OPMS	BUDGET
<b>JULY</b>	IDP implementation (2023/2024) Preparation of the Process Plan and the Framework Plan Submission of the IDP Process Plan for assessment by the DLGTA	4 <sup>th</sup> quarterly review due (2021/2022)	Commence planning for next three years budget, reviews of IDP and budget policies and consultation in accordance with budget process co-ordination role, review previous year budget evaluation

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

			<p>checklist, council delegations and budget time schedule of key deadlines</p> <p>Review delegation and all budget related policies including review tariff, rates, credit control and supply chain management and cash management/investment policies</p> <p>Establish department budget committees to include portfolio councillors and official and delegation in accordance with delegation policy</p>
<b>AUGUST</b>	<p>IDP Process Plan for 2023/2024 finalized and adopted by the Council</p> <p><b>IDP Alignment meeting</b> at DC 27</p> <p>District-wide <b>IDP Strategic Planning Workshop</b></p>	Launch campaign to publish performance	<p>Table in council budget and IDP time table schedule of key deadlines(include timing for development of policies and process of consultation</p> <p>Mayor must established appropriate committees and consultation forums and plan programmes of internal and public meeting, to update community needs analysis and obtain feedback on past years performance</p> <p>Advertise budget and IDP time schedule in terms of budget consultation policy</p>
<b>SEPTEMBER</b>	<p>Implementation of the IDP Process Plan</p> <p><b>IDP Representative Forum Meeting</b></p>	First quarterly review due	<p>Determination of revenue projections and draft initial allocations to powers and functions and departments for the</p>

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

	Commencement of IDP <b>Analysis and Strategies Phase</b>		2023/2024 financial year. Implementation of budget and IDP time schedule of key deadlines for 2023/2024 financial year
--	---	--	---

2 <sup>nd</sup> Quarter	IDP	OPMS	BUDGET
<b>OCTOBER</b>	Evaluation of changed circumstances Continuation of development of objectives and strategies Development of sector Plans initiation	Inform the IDP Preparation Process of KPA, objectives and strategies	Next three year budget- commence preparation of departmental operational plans and service delivery and budget implementation plan aligned to strategic priorities in IDP and inputs from other stakeholders including government and bulk service providers(NER) Conclude the first draft and policies for initial council discussion as per MFMA guide
<b>NOVEMBER</b>	Continuation of development of objectives and strategies	Inform the IDP Preparation Process of KPA, objectives and strategies	Next three year budget- commence community and stakeholders consultation process, review inputs, financial models, assess impacts on tariffs and charges and consider funding decisions incl. borrowing, adjust estimates based on plans and resources as per MFMA guide
<b>DECEMBER</b>	Continuation of development of objectives and strategies Completion of Projects Proposals to inform Municipal, Provincial and National budget processes <b>IDP Alignment Meeting</b> convenes	Inform the IDP Preparation Process of KPA, objectives and strategies	Finalize first draft of departmental operational plans and services delivery and budget implementation plan for review against strategic priorities as per MFMA guide

3 <sup>rd</sup> Quarter	IDP	OPMS	BUDGET
-------------------------	-----	------	--------

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

<b>JANUARY</b>	Continuation of Projects Planning Continuation of Sector Planning	Bi-annual report preparation	Notes the presidents' state of the address for further budget priorities, finalize details operating and capital budget in the prescribed format incorporating national and provincial budget allocation, integrate and align to IDP documentation and draft service delivery and implementation plan, finalize budget policies including tariffs policy As per MFMA guide  tabling (Proposed National and Provincial allocations for three years must be made available by 20 January of each year) <b>MFMA s 36</b>
<b>February</b>	<b>IDP</b>	<b>OPMS</b>	<b>BUDGET</b>  Note national budget for provincial and provincial allocations to municipalities for incorporation into budget Accounting officer must table adjustment budget as per MFMA section 28
<b>MARCH</b>	Fifth <b>IDP Alignment Meeting</b> convenes at DC27 Finalization of draft IDP document Submission of the draft IDP document	Finalization of customer and employee survey	Accounting Officer must receive the notification of any transfers that that will be made to the municipality from other municipalities in each of the next

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

	for assessment by sector departments		three financial year as per MFMA section 37(2) Table in council the draft annual budget and all supporting document as section 16(2)17 & 87 (3) Make public the tables annual budget and accompanying budget documentation, invite the community to submit representation and submit to the provincial treasury, national treasury and other affected organs of state as MFMA section 22

4 <sup>th</sup> Quarter	IDP	OPMS	BUDGET
<b>APRIL</b>	Advertisement of final draft IDP for public comments Assessment of the IDP by sector departments	3 <sup>rd</sup> quarterly review due	Accounting officer assists the Mayor in revising budget documentation in accordance with consultative processes and taking into account the results from the third quarterly review of the current year Confirm provincial and national allocations

4 <sup>th</sup> Quarter	IDP	OPMS	BUDGET
<b>MAY</b>	Consideration of gazetted budgets from National and Provincial Government Departments Consideration of inputs following 21 day notice period and assessment by	Service and scorecards targets set for the next financial year Annual strategic targets broken down to quarterly targets	Public hearings on the budget and Council debate Council considers views of the community and other Provincial and National organs of the state and municipalities

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

	sector departments <b>IDP Representative Meeting</b> convenes Council adoption of IDP document		Accounting Officer assists the Mayor in preparing the final budget documentation for consideration and approval at least 30 days before the start of the budget year taking into account consultative processes and any other new information of material nature Mayor to be provided with an opportunity to respond to submissions during consultation budget amendments for Council consideration Council to consider approval of budget and plans at least 30 days before start of budget year – <b>MFMA s 23, 24, MSA Chapter 4 as amended</b>
<b>JUNE</b>	Submission of Council adopted IDP document to the MEC for noting and comment	Approval of services and strategic scorecard targets Review and conclusion of HOD performance contracts	Council to approve annual budget by resolution, setting taxes and tariffs, approving changes to IDP and budget related policies, approving measurable performance objectives for revenue by source expenditure by vote before start of budget year – <b>MFMA s 213, 24: MSA Chapter 4 as amended</b> Accounting Officer of the Municipality publishes adopted budget and Plans – <b>MFMA s 69; MSA s57</b> Accounting Officer submits to the Mayor no later than 14 days after approval of the

## UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

			<p>budget a draft of the SDBIP and annual performance agreements required by s 57 (1) (b) of the MSA <b>MFMA s 69; MSA s 57</b></p> <p>The Mayor approves the SDBIP within 28 days after approval of the budget and ensures that annual performance contracts are concluded in accordance with s 57 (2) of the MSA.</p> <p>The Mayor submits the approved SDBIP and performance agreements to Council and MEC for Local Government and makes public within 14 days after approval – <b>MFMA s 53; MSA s 38-45, 57 (2)</b></p> <p>Council finalizes a system of delegations – <b>MFMA s 59, 79, 82; MSA s 59-65</b></p>
--	--	--	--

### PROGRESS DIAGRAM AND TIME FRAMES

PHASE / MONTHS	1J	2A	3S	4O	5N	6D	7J	8F	9M	10A	11M	12J
<b>PHASE 1</b>												
Preparation of Process Plan												
Advertising and Publicising of Process Plan												
IDP Steering Committee Meeting												
IDP Rep Forum												
Adoption by Council												
<b>PHASE 2</b>												
Collection of relevant information												
Evaluate and assess information												
IDP Steering Committee Meeting												
IDP Representative Forum												
<b>PHASE 3</b>												
Prepare a summary document												
Prepare implementation strategy												
IDP Steering Committee												

# UMHLABUYALIGANA MUNICIPALITY: IDP, BUDGET AND PMS PROCESS PLAN

<b>PHASE 4</b>												
Incorporate Comments from stakeholders												
Incorporate completed sector plans												
Draft IDP												
IDP Steering Committee Meeting												
IDP Rep Forum												
Prioritise Projects												
IDP, Budget and PMS Alignment												
<b>PHASE 5</b>												
IDP Steering Committee & Rep. Forum												
Advertise for Public Comment												
IDP Steering committee meeting												
IDP Rep Forum												
Incorporate Public Comments												
Adoption by Council												
Submission of Final Draft												
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN