



Aiming above the horizon

IDP/BUDGET/PMS REVIEW PROCESS PLAN 2020-2021

The Executive Mayor

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IDP/ BUDGET/ PMS REVIEW PROCESS PLAN 2020/21

PHASE	ACTIVITY	COORDINATING UNIT/ DEPARTMENT	LEGISLATIVE REQUIREMENT	TIMEFRAME
PLANNING PHASE	Preparation of IDP Framework & Process Plan 2020/21	Planning Unit, Budget Office & PMS Office	MSA & MFMA	Jul 2019
	Advertise the IDP Framework & IDP/ Budget Process Plan 2020/21 ❖ Publication of process plan on the FDDM website	Compliance Unit	MSA & MFMA	Jul 2019
	Completion and submission of Budget Evaluation Checklist to National Treasury	Accounting Officer, Heads of Departments (Section 56 Directors) & Budget Office	MFMA	Aug 2019
	Tabling of the IDP Framework and Consolidated IDP, Budget & PMS Process Plan 2020/21 to Council	Planning Unit, Budget Office & PMS Office	MSA & MFMA	Aug 2019
	Engagement with local Municipalities on the IDP Framework and IDP Process Plan during 1 st quarter IDP Managers' forum	Planning Unit	MSA	Aug 2019

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	Planning of the next three year budget in accordance with co-ordination role of the budget process	Budget Office	MFMA	Aug 2019
	Begin with the Annual Report Preparation Process	PMS	MSA	Aug 2019
	Review and adoption of Budget related policies	Finance	MFMA	Aug 2019
ANALYSIS PHASE	Desktop analysis of existing level of development through reports from local Municipalities (Situational Analysis)	Planning Unit	MSA	Oct 2019
	Confirmation and consolidation of status quo of projects and community needs (Needs Assessment report)	Planning Unit & Budget Office	MSA	Oct 2019
	Determine the funding/ revenue projections for the next three years	Budget Office	MFMA	Oct 2019

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	Engagement with National & Provincial departments on the outcomes of the assessments with sector departments and other relevant stakeholders	Planning Unit	MSA	Oct 2019
	Alignment workshop to evaluate information from PMS and Monitoring & Evaluation	Monitoring & Evaluation Unit	MSA	Oct 2019
	Conduct Public Participation	Planning & Budget Units	MSA	Dec 2019
	SDBIP 19/20 1st quarter reporting	Monitoring & Evaluation Unit		July - September 2019
	Preparation of the draft budget commences	Budget Office	MFMA	November 2019
	First quarter budget report submitted to Council			July - September 2019
STRATEGIES PHASE	Strategic Planning Session ❖ Review of strategic objectives for service delivery and development	Office of the Municipal Manager & Planning Unit	MSA	December 2019

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	<ul style="list-style-type: none"> ❖ Broad capital budget allocations ❖ Development of the Vision & Mission of the District Municipality 			
	<p>Alignment of objectives with National & Provincial Imperatives (NDP, FSGDS & other relevant policies)</p>			December 2019
	<p>Preparation of the Draft Budget continues</p>	Budget Office	MFMA	December 2019
	<ul style="list-style-type: none"> ❖ Projects Identification (IDP Projects list) ❖ Projects Costing ❖ Confirmation of project lists from local Municipalities and alignment of projects with sector strategic plans, NDP, FSGDS etc 	Planning Unit, PM&PW Department & Budget Office		January 2020

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	Finalise Annual Report	Monitoring & Evaluation Unit	MSA	January 2020
	Tabling of the Mid-Year Performance Assessment Report to Council			
	Submit second quarter budget report to Council Conduct Steering	Budget Office	MFMA	January 2020
	Submission of the Budget Return Form to National and Provincial Treasuries	Budget Office	MFMA	February 2020
	Conduct Steering Committee to present progress on the draft IDP	Planning Unit	MSA	February 2020
	Tabling of Adjustment Budget to Council	Budget Office	MFMA	February 2020
	As a result of Adjustment Budget, consider review of the SDBIP	Monitoring & Evaluation Unit	MSA/ MFMA	February 2020
	Publication of the Annual Report	Monitoring & Evaluation Unit	MSA	February 2020
INTEGRATION PHASE	Integration of programmes and projects of National & Provincial Departments	Planning Unit	MSA	Feb 2020

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APPROVAL PHASE	Present Draft IDP & Draft Budget to Council for approval	Planning Unit and Budget Unit	MSA & MFMA	March 2020
	Advertise draft IDP and draft Budget for public Comment ❖ Place draft IDP and draft Budget on FDDM website	Compliance Office	MSA & MFMA	April 2020
	Tabling of the Revised Service Delivery & Budget Implementation Plan to Council	Monitoring & Evaluation Unit	MSA & MFMA	March 2020
	Submission of an Oversight Report to Council for adoption	Monitoring & Evaluation Unit	MSA & MFMA	March 2020
	Submit to MEC for Co-operative Governance and Traditional Affairs, Provincial Treasury, National Treasury copies of approved Draft IDP, Draft Budget & Revised SDBIP	Compliance Office	MSA & MFMA	April 2020
	IDP & Budget Road Shows:	Planning Unit & Budget Office	MSA & MFMA	April 2020

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	<ul style="list-style-type: none"> ❖ Present summarised draft IDP & draft Budget ❖ IDP response to key issues raised by wards ❖ Highlight planned projects and programmes 			
	Third quarter Budget Report to Council	Budget Office	MFMA	March 2020
	Updating and Amendment of IDP (engagements and inputs from sector departments, National & Provincial departments)	Planning Unit	MSA	April - May 2020
	Submission of Budget Return form to National & Provincial Treasury	Budget Office	MFMA	April 2020
	Submission of Oversight Report to Provincial Legislature & Provincial Treasury	Monitoring & Evaluation Unit	MSA	April 2020
ADOPTION PHASE	Tabling or Submission of final IDP & Budget to Council for Adoption	Planning Unit & Budget Unit	MSA & MFMA	May 2020
	Advertisement of final IDP and final Budget and publication on FDDM website	Compliance Office	MSA & MFMA	June 2020

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	Tabling of the Draft 2020/21 SDBIP	Monitoring & Evaluation Unit		May 2020
	Approval of 2020/21 SDBIP by the Executive Mayor	Monitoring & Evaluation Unit	MSA & MFMA	June 2020
	Submit to MEC for Co-operative Governance and Traditional Affairs, Provincial Treasury, National Treasury and place on FDDM web site the final IDP, final Budget and Approved SDBIP, within the prescribed timeframe	Compliance Office	MSA & MFMA	June 2020