



**Aiming above the horizon**

**IDP/BUDGET/PMS REVIEW PROCESS PLAN 2021-2022**

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## IDP/ BUDGET/ PMS REVIEW PROCESS PLAN 2021/22

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

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	Planning of the next three year budget in accordance with co-ordination role of the budget process	<b>Budget Office</b>	<b>MFMA</b>	<b>Aug 2020</b>
	Begin with the Annual Report Preparation Process	<b>PMS</b>	<b>MSA</b>	<b>Aug 2020</b>
	Review and adoption of Budget related policies	<b>Finance</b>	<b>MFMA</b>	<b>Aug 2020</b>
<b>ANALYSIS PHASE</b>	Desktop analysis of existing level of development through reports from local Municipalities (Situational Analysis)	<b>Planning Unit</b>	<b>MSA</b>	<b>Oct 2020</b>
	Confirmation and consolidation of status quo of projects and community needs (Needs Assessment report)	<b>Planning Unit &amp; Budget Office</b>	<b>MSA</b>	<b>Oct 2020</b>
	Determine the funding/ revenue projections for the next three years	<b>Budget Office</b>	<b>MFMA</b>	<b>Oct 2020</b>

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	Engagement with National & Provincial departments on the outcomes of the assessments with sector departments and other relevant stakeholders	<b>Planning Unit</b>	<b>MSA</b>	<b>Oct 2020</b>
	Alignment workshop to evaluate information from PMS and Monitoring & Evaluation	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA</b>	<b>Oct 2020</b>
	Conduct Public Participation	<b>Planning &amp; Budget Units</b>	<b>MSA</b>	<b>Dec 2020</b>
	SDBIP 19/20 1st quarter reporting	<b>Monitoring &amp; Evaluation Unit</b>		<b>July - September 2020</b>
	Preparation of the draft budget commences	<b>Budget Office</b>	<b>MFMA</b>	<b>November 2020</b>
	First quarter budget report submitted to Council			<b>July - September 2020</b>
<b>STRATEGIES PHASE</b>	Strategic Planning Session ❖ Review of strategic objectives for service delivery and development	<b>Office of the Municipal Manager &amp; Planning Unit</b>	<b>MSA</b>	<b>December 2020</b>

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	<ul style="list-style-type: none"> <li>❖ Broad capital budget allocations</li> <li>❖ Development of the Vision &amp; Mission of the District Municipality</li> </ul>			
	Alignment of objectives with National & Provincial Imperatives (NDP, FSGDS & other relevant policies)			December 2020
	Preparation of the Draft Budget continues	Budget Office	MFMA	December 2020
	<ul style="list-style-type: none"> <li>❖ Projects Identification (IDP Projects list)</li> <li>❖ Projects Costing</li> <li>❖ Confirmation of project lists from local Municipalities and alignment of projects with sector strategic plans, NDP, FSGDS etc</li> </ul>	Planning Unit, PM&PW Department & Budget Office		January 2021

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	Finalise Annual Report	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA</b>	<b>January 2021</b>
	Tabling of the Mid-Year Performance Assessment Report to Council			
	Submit second quarter budget report to Council	<b>Budget Office</b>	<b>MFMA</b>	<b>January 2021</b>
	Conduct Steering			
	Submission of the Budget Return Form to National and Provincial Treasuries	<b>Compliance Unit</b>	<b>MFMA</b>	<b>February 2021</b>
	Conduct Steering Committee to present progress on the draft IDP	<b>Planning Unit</b>	<b>MSA</b>	<b>February 2021</b>
	Tabling of Adjustment Budget to Council	<b>Budget Office</b>	<b>MFMA</b>	<b>February 2021</b>
	As a result of Adjustment Budget, consider review of the SDBIP	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA/ MFMA</b>	<b>February 2021</b>
	Publication of the Annual Report	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA</b>	<b>February 2021</b>
<b>INTEGRATION PHASE</b>	Integration of programmes and projects of National & Provincial Departments	<b>Planning Unit</b>	<b>MSA</b>	<b>Feb 2021</b>

## IDP/ BUDGET/ PMS REVIEW PROCESS PLAN 2021/22

<b>APPROVAL PHASE</b>	Present Draft IDP & Draft Budget to Council for approval	<b>Planning Unit and Budget Unit</b>	<b>MSA &amp; MFMA</b>	<b>March 2021</b>
	Advertise draft IDP and draft Budget for public Comment  ❖ Place draft IDP and draft Budget on FDDM website	<b>Compliance Office</b>	<b>MSA &amp; MFMA</b>	<b>April 2021</b>
	Tabling of the Revised Service Delivery & Budget Implementation Plan to Council	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA &amp; MFMA</b>	<b>March 2021</b>
	Submission of an Oversight Report to Council for adoption	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA &amp; MFMA</b>	<b>March 2021</b>
	Submit to MEC for Co-operative Governance and Traditional Affairs, Provincial Treasury, National Treasury copies of approved Draft IDP, Draft Budget & Revised SDBIP	<b>Compliance Office</b>	<b>MSA &amp; MFMA</b>	<b>April 2021</b>
	IDP & Budget Road Shows:	<b>Planning Unit &amp; Budget Office</b>	<b>MSA &amp; MFMA</b>	<b>April 2021</b>

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	<ul style="list-style-type: none"> <li>❖ Present summarised draft IDP &amp; draft Budget</li> <li>❖ IDP response to key issues raised by wards</li> <li>❖ Highlight planned projects and programmes</li> </ul>			
	Third quarter Budget Report to Council	<b>Budget Office</b>	<b>MFMA</b>	<b>March 2021</b>
	Updating and Amendment of IDP (engagements and inputs from sector departments, National & Provincial departments)	<b>Planning Unit</b>	<b>MSA</b>	<b>April - May 2021</b>
	Submission of Budget Return form to National & Provincial Treasury	<b>Budget Office</b>	<b>MFMA</b>	<b>April 2021</b>
	Submission of Oversight Report to Provincial Legislature & Provincial Treasury	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA</b>	<b>April 2021</b>
<b>ADOPTION PHASE</b>	Tabling or Submission of final IDP & Budget to Council for Adoption	<b>Planning Unit &amp; Budget Unit</b>	<b>MSA &amp; MFMA</b>	<b>May 2021</b>
	Advertisement of final IDP and final Budget and publication on FDDM website	<b>Compliance Office</b>	<b>MSA &amp; MFMA</b>	<b>June 2021</b>



## IDP/ BUDGET/ PMS REVIEW PROCESS PLAN 2021/22

	Tabling of the Draft 2020/21 SDBIP	<b>Monitoring &amp; Evaluation Unit</b>		<b>May 2021</b>
	Approval of 2020/21 SDBIP by the Executive Mayor	<b>Monitoring &amp; Evaluation Unit</b>	<b>MSA &amp; MFMA</b>	<b>June 2021</b>
	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	<b>Compliance Office</b>	<b>MSA &amp; MFMA</b>	<b>June 2021</b>