

**UMfolozi Municipality**

**2019/2020**



**2019/20 IDP REVIEW &  
BUDGET PROCESS PLAN**



# UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

## SECTION 1: INTRODUCTION

### 1.1 BACKGROUND

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).

After 2016 elections the municipality engaged in a new 5 years IDP cycle. After these elections a new IDP will was developed and it will come to an end in year 2021/2022. 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; and



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- ❖ 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,
- ❖ 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.

### **1.2 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 No. 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*



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*(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.

### **1.3 IDP REVIEW PROCESS**

When reviewing the IDP, there are key factors that need to be considered as means towards the improvement of the Integrated Development Plan.

#### **1.3.1 Key Elements to be addressed during the IDP review Process**

Umfolozi Municipality will for the 2019/20 IDP review address amongst other issues the following.

- ❖ MEC panel comments for 2018/19 IDP
- ❖ New council priorities;



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- ❖ 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 Operation Sukuma Sakhe/War on Poverty and War Rooms effectiveness;
- ❖ UMfolozi SDF finalization in line with the Spatial Planning and Development Act; and
- ❖ Ensure that the IDP is Aligned to the SDF; key national, provincial, and district plans.

### **1.3.2 Municipal Standard Chart of Accounts (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 standardized 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.

The Regulations apply to all municipalities and municipal entities and indicate its applicability and relevance to each specific municipal environment while accommodating organizational uniqueness and structural differences. The



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Regulation provides for a three year preparation and readiness window for the whole local government sphere to be compliant with all of the mSCOA segments.

### **1.3.3 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.



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### **SECTION 2: INSTITUTIONAL ARRANGEMENTS**

This section reflects the institutional arrangements of uMfolozi Local Municipality in relation with the Integrated Development Plan deliverables.

#### **2.1 THE IDP MANAGER:**

The Functions of the IDP Manager in line with the IDP process plan implementation are presented below as follows:

- ❖ Responsible for the implementation 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 that:
  - All different role-players, especially councillors and officials are involved during the implementation of the IDP process plan;
  - Allocation of the roles to the relevant municipal officials;
  - Conditions for participation are conducive;
  - The time-frames are adhered to;
  - The participatory, strategic, implementation oriented and sector planning requirements are complied with;
  - The information is gathered, collated and evaluated and properly documented;
  - The information obtained receives attention during the IDP process; and that
  - The review process is horizontally and vertically aligned and complies with national and provincial requirements,



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### **2.2 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 uMfolozi Municipality.

#### **2.2.1 Terms of Reference for the uMfolozi 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; and
- ❖ Processing, summarising and documentation of project outputs,





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

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

K.E Gamede	Municipal Manager (Chairperson)
S.G Hlatshwayo	Senior Manager: Technical Services
N.Z Ndlela	Senior Manager: Corporate Services
C.N Ngema	Senior Manager: Community Service
K.N Mthethwa	Chief Financial Officer
T.V Xulu	Chief Operations Officer
A.S Shandu	Manager: PMS& Compliance
N Mnqayi	Manager: Youth
N Mnqayi	Manager: IDP/development planning
P.P Khumalo	Manager : Communication
T.L Mfusi	Manager: Council Support
B.A Mkhwanazi	Manager: Human Resource
N.N Nyewula	Administration Manager
B.D Mtshali	Manager: CD/DM
D.S Mthembu	Chief Traffic Officer
M.M.R Magubane	Manager: Operations & Maintenance
V.G Mdletshe	Manager Financial Services
T.N Xulu	PMU Manager
S.S Maphanga	Manager: LED/Tourism

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

## **2.3 ALLOCATION OF ROLES AND RESPONSIBILITIES**

### **2.3.1 Role-Players**

The involvement and participation of the following role-players remains crucial to the accomplishment of IDP process plan implementation:



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- ❖ All municipal Councillors ;
- ❖ Municipal Manager;
- ❖ Diverse Heads of uMfolozi Municipal Departments;
- ❖ Members of the IDP/ Budget Steering Committee;
- ❖ Members of the IDP Representative Forum;
- ❖ The District IDP Steering Committee;
- ❖ Organised business structures;
- ❖ Traditional Councils;
- ❖ Sector Departments;
- ❖ Ward Committees;
- ❖ Provincial Departments;
- ❖ NGOs and CBOs;
- ❖ Local Farmers Association;
- ❖ Organised Farm-workers structures; and the
- ❖ Private sector

### **2.3.2 Roles and Responsibilities**

#### **(a) uMfolozi Municipal Council**

UMfolozi 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 Mscosa Action Plan
- ❖ Ensuring that the IDP is linked to the PMS and Municipal Budget



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### **(b) 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; and
- ❖ Monitoring and evaluation of the IDP implementation process

### **(c) The IDP Manager:**

The IDP Manager is assigned the following responsibilities:

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

### **(d) 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; and



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- ❖ Attending to MEC's comments

### **(e) 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.

### **(f) District (KCDM) IDP Representative Forum:**

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

### **(g) Municipal Officials:**

- ❖ The municipal officials are responsible for the implementation of the IDP gathering of the information on any changes in any circumstance;
- ❖ Provision of budgetary information and any information on the performance evaluation;
- ❖ Provision of technical expertise during the planning process;
- ❖ Interaction with the Ward Councillors and Ward Committees; and
- ❖ Guidance and advisory provision that is crucial during the IDP process.



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### **(h) 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.

### **(i) 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; and
- ❖ Ensure budgetary alignment between provincial programmes and projects and the municipality's IDP.

### **(j) 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.

### **(k) 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



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information with regard to land rights and possible available areas for future development.

### **(I) 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 remains the key responsibility for each member to efficiently represent his or her institution during the IDP review process

#### **2.3.3 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; and
- ❖ To ensure communication between all the stakeholders in the IDP process.

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



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### **SECTION 4: MECHANISMS FOR PUBLIC PARTICIPATION**

#### **4.1 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.

#### **4.2 MECHANISMS FOR PUBLIC PARTICIPATION**

The following mechanisms will be used for participation:

##### **4.2.1 Mayoral IDP Road Show**

Umfolozi Municipality will use mayoral road-shows to enhance public participation

##### **4.2.2 Ward IDP Consultative meetings**

The municipality has 17 wards and will engage all 17 wards for a meaningful participation in the process.

##### **4.2.3 Community Engagement Meetings**

The municipality will timeously have community engagement meetings as a measure to maximise public participation in regards to the IDP.



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### **4.2.4 IDP Representative Forum**

This forum is a representation of all stakeholders. Umfolozi Municipality ensures that this structure remains inclusive as much as possible. The meetings of this structure are regarded as an action programme.

### **4.2.5 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.

### **4.2.6 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.

### **4.2.7 Municipal Notice Boards**

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





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### **SECTION 5: MECHANISMS ON ALIGNMENT**

This section indicates the key mechanisms from which the uMfolozi Municipality's IDP process plan draws its alignment.

#### **5.1 ALIGNMENT BETWEEN NATIONAL AND LOCAL GOVERNMENT**

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

#### **5.2 ALIGNMENT BETWEEN PROVINCIAL AND LOCAL GOVERNMENT**

Alignment between the provincial sector plans and uMfolozi municipal IDP will always remain evident. The process will be able to integrate the plans, programmes and budgets of the Provincial Sector Departments into the Municipal IDP; this includes the KZN Provincial Growth and Development Plan and Strategy (PGDP/S).

#### **5.3 ALIGNMENT BETWEEN DISTRICT AND LOCAL MUNICIPALITY**

Alignment at this level will be co-ordinated at the uMfolozi 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 Growth and Development Plan (DGDP) and uMfolozi municipal plans through which the service delivery is facilitated.



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### **5.4 ALIGNMENT AT LOCAL MUNICIPAL LEVEL**

Performance in terms of expected roles and responsibilities will be monitored through the IDP Steering Committee meetings through which the reports on the current and future year deliverables will be presented. Alignment with other border municipalities i.e. The City of uMhlatuze and uMlalazi will be strengthened.



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### SECTION 6: ACTION PROGRAMME AND TIME FRAMES

The methodology to be followed in the IDP process is as follows:

- Phase 1:** Preparing for IDP / Formulation
- Phase 2:** Gathering of the IDP Information through public participations and other relevant sources
- Phase 3:** Assessment and Evaluation of Information
- Phase 4:** Aligning IDP, Budget and PMS
- Phase 5:** Adoption of IDP

#### 6.1 2019/20 IDP PREPARATION SUMMARY

- ❖ Preparation of Process Plan;
- ❖ Discussing the IDP Process Plan at the Steering Committee;
- ❖ Submission of Process Plan to all relevant key structures;
- ❖ Tabling of the 2019/20 IDP Process Plan to Council for adoption;
- ❖ IDP Public Participations as means to compile the Draft 2019/20 IDP;
- ❖ Tabling of the Draft 2019/20 IDP to all relevant key structures;
- ❖ Advertising of the Draft 2019/20 to the local newspapers as a Public Notice to enhance more participation;
- ❖ Compilation of the Final 2019/20 IDP;
- ❖ Tabling of the Final 2019/20 IDP to all relevant key structures;
- ❖ Public Participations on the Final 2019/20 IDP;
- ❖ Tabling the Final 2019/20 IDP to the Council; and
- ❖ Advertising the Final 2019/20 IDP as a Public Notice.



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### 6.2 2019/20 IDP PREPARATION TIME FRAMES (September 2018-June 2019)

#### PHASE 1: PREPARING FOR IDP / FORMULATION

- ❖ Preparation of the IDP Process Plan;
- ❖ Tabling of the IDP process plan to the council for adoption; and
- ❖ Draft the Public Participations Concept document

#### PHASE 2: GATHERING OF INFORMATION

NO	AUDIENCE DESCRIPTION	PLANNED/ PROPOSED DRAFT IDP PUBLIC CONSULTATION	VENUE
1	Somopho Tribal Authority	07 November 2018	Sokhulu Tribal Court
2	Mbuyazi Tribal Authority	20 November 2018	Mbuyazi Tribal Court
3	Mambuka Tribal Authority	20 November 2018	Mambuka Tribal Court
4	Mhlana Tribal Authority	21 November 2018	Somopho Tribal Court
5	IDP Representative Forum	20 September 2018	Municipal Council Chambers
6	IDP Representative Forum	24 October 2018	Municipal Council Chambers
7	Ward Committees IDP Consultation	24 October 2018	Municipal Council Chambers
8	Community/ Public Participation (Inland)	05 December 2018	Cinci Community Hall
9	Community/ Public Participation (Coastal)	13 December 2018	Ndlabeyilandula Community Hall
PLANNED/ PROPOSED FINAL IDP PUBLIC CONSULTATION			
10	IDP Steering Committee	25 March 2018	Municipal Council Chambers
11	IDP Representative Forum	26 March 2018	Municipal Council Chambers
12	Ward Committees IDP Consultation	05 April 2018	To be Confirmed
13	Community/ Public Participation (Inland)	09 April 2018	To be Confirmed
14	Community/ Public Participation (Coastal)	18 April 2018	To be Confirmed

- ❖ 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;
- ❖ Consider the new information generated from internal and external sources e.g. municipal officials, stakeholders, sector departments, service providers etc. Identify sector plans that need to be integrated in the plan;
- ❖ Presentation of the 2018/19 IDP Assessment Report from the Department of CoGTA to all relevant Structures;
- ❖ Address the MEC comments on the 2018/19 IDP;



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- ❖ Identify further gaps that need to be addressed on the 2019/20 IDP; and
- ❖ Collect the information from the Steering Committee, IDP Representative Forum and Public Participation uMfolozi Planning and other relevant structures.

### **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;
- ❖ Publicize the proposed changes within the IDP with an allowance of 21 days inspection; AND
- ❖ Submission of the 2019/20 Draft IDP to the Department of CoGTA for a pre-assessment

### **PHASE 4: IDP, BUDGET AND PMS ALIGNMENT**

- ❖ Incorporate comments from all stakeholders;
- ❖ Incorporate completed sector plans;
- ❖ Draft the reviewed IDP document;
- ❖ Distribute IDP to Councilors and Officials for comments;
- ❖ Conduct IDP Steering Committee and IDP Representative Forum meeting;
- ❖ Submission of Draft IDP to the Province;

### **PHASE 5: APPROVAL OF THE FINAL IDP**

- ❖ Address the Department's comments;
- ❖ Preparation of the 2019/20 final IDP documents;
- ❖ Public/ Stakeholder Consultation on the final IDP as follows:

NO	ACTION DESCRIPTION	DATE	VENUE
1	IDP/Budget Steering Committee Meeting	05/04/2019	Municipal Council Chambers



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2	IDP Representative Forum	10/04/2019	Municipal Council Chambers
3	Consultations with Tribal Authorities	11-17/04/2019	Tribal Authorities
4.	Consultations with Municipal Structures	19/04/2019	Municipal Council Chambers
5	General Community Consultation Meeting	25/04/2019	Coastal Wards
6	General Community Consultation Meeting	30/04/2019	Inland Wards

- ❖ Tabling of the final IDP to the Council Structures;
- ❖ Collection of all sector plans and other relevant supporting documents;
- ❖ Submission of the final 2019/20 IDP to the Department of CoGTA; and
- ❖ Publicize the final 2019/20 IDP

### 6.3 2019/20 IDP REVIEW AND BUDGET CONSOLIDATED IMPORTANT DATES

NO	ACTION DESCRIPTION	DATE	VENUE
1	IDP/Budget Steering Committee Meeting	31/08/2018	Municipal Council Chambers
2	IDP Representative Forum	14/09/2018	Municipal Council Chambers
3	Consultations with Tribal Authorities	17-28/10/2018	Tribal Authorities
4.	Consultations with Municipal Structures	09/11/2018	Municipal Council Chambers
5	General Community Consultation Meeting	16/11/2018	Coastal Wards
6	General Community Consultation Meeting	23/11/2018	Inland Wards
7	IDP/Budget Steering Committee Meeting	05/04/2019	Municipal Council Chambers
8	IDP Representative Forum	10/04/2019	Municipal Council Chambers
9	Consultations with Tribal Authorities	11-17/04/2019	Tribal Authorities
13	Consultations with Municipal Structures	19/04/2019	Municipal Council Chambers
11	General Community Consultation Meeting	25/04/2019	Coastal Wards
12	General Community Consultation Meeting	30/04/2019	Inland Wards

#### IDP Management Plan Time Frames by the Department of CoGTA

TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
<b>Phase 1: COGTA provide support to IDPs; IDP Stakeholders Meeting</b>	<b>November 2017 - March 2018</b>		
➤ <b>Provide support to Municipalities to improve IDPs</b>	November 2017 -March 2018	- IDP Co-ordination BU	<ul style="list-style-type: none"> <li>• Ensure establishment of Project Steering Committee or equivalent body</li> <li>• Participation in Planners Forum</li> </ul>



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			and RFs
		- Municipal representatives	<ul style="list-style-type: none"> <li>Establish and convene meetings of PSC, RF</li> <li>Draft the IDP</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Make input into IDPs</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>Make input into DPs</li> </ul>
➤ <b>IDP Stakeholders Meeting (on 2018/19 Reviewed IDP process)</b>	09 Feb 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Present, discuss and adopt reviewed Provincial IDP Management Plan</li> <li>Present, discuss and adopt reviewed IDP assessment criteria</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Framework to guide agenda setting for IDP and budget Imbizo.</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>



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TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
<b>Phase 2: Submission Draft Reviewed 2018/19 Reviewed IDPs and WBPs to COGTA</b>	<b>29 March 2018</b>		
➤ <b>Submission Draft 2018/19 Reviewed IDPs to COGTA for assessment</b>	1 - 29 March 2018	- COGTA Planners	<ul style="list-style-type: none"> <li>• Support Municipalities with completion of draft Reviewed IDPs</li> <li>• Receive &amp; register draft Reviewed IDPs</li> </ul>
	1 - 23 March 2018	- Municipal Planners	<ul style="list-style-type: none"> <li>• Finalise draft Reviewed IDPs into Process Plans &amp; IDP Assessment Criteria</li> <li>• Finalise WBPs</li> <li>• Align WBPs to IDP</li> <li>• Submit Draft IDPs and WBPs</li> </ul>
	1 - 3 March 2018	- Sector Departments	<ul style="list-style-type: none"> <li>• Make input into finalization of draft Reviewed IDPs</li> <li>• Participate in IDP RFs and provide project and budget information</li> <li>• Assessment of IDPs</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>• Make input into finalisation of draft Reviewed IDPs</li> <li>• Participate in IDP RFs and provide project and budget information</li> <li>• Assessment of IDPs</li> </ul>
<b>Phase 3: Convene Draft IDP</b>	<b>11 May 2018</b>		





## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

assessment sessions; Convene IDP/DGDP Alignment Feedback session; and Establishment of MEC Panel				
<p>➤ <b>Draft IDP assessment sessions:</b></p> <ul style="list-style-type: none"> <li>• Ugu</li> <li>• Ethekwini</li> <li>• Ilembe</li> <li>• Umgungundlovu</li> <li>• Harry Gwala</li> <li>• King Cetshwayo</li> <li>• Umkhanyakude</li> <li>• Uthukela</li> <li>• Amajuba</li> <li>• Zululand</li> <li>• Umzinyathi</li> </ul>	03 - 06 April 2018	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Cut CDs for distribution to stakeholders</li> </ul>	
			Sector Departments & SOE	<ul style="list-style-type: none"> <li>• Collect CD copies from COGTA</li> </ul>
	• 09 April 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Assessment of IDPs</li> <li>• Fill out templates and disseminate to municipalities</li> </ul>	
	• 10 April 2018			
	• 10 April 2018	- Municipal representatives	<ul style="list-style-type: none"> <li>• Receive populated assessment templates</li> <li>• Incorporate comments into Final IDP.</li> </ul>	
	• 11 April 2018			
	• 12 April 2018	- Sector Departments	<ul style="list-style-type: none"> <li>• Update baseline information</li> <li>• Provide financial support for catalytic projects</li> <li>• Provide alignment information and check if information provided in Nov. 2016 was included</li> </ul>	
	• 13 April 2018			
	• 16 April 2018			
	• 17 April 2018	- SOEs	<ul style="list-style-type: none"> <li>• Assessment of IDPs</li> <li>• Fill out templates</li> <li>• Provide alignment information and check if information provided in Nov. 2017 was included</li> </ul>	
• 17 April 2018				
• 18 April 2018				
• 19 April				



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TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
	2018		
➤ <b>Draft WBPs assessment</b>	20 - 24 April 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Assessment of WBPs, including WBP alignment to IDPs</li> <li>• Fill out templates and disseminate to municipalities</li> </ul>
➤ <b>Draft IDP assessment feedback session</b>	20 April 2018	-IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Arrange venue for session</li> <li>• Invite stakeholders</li> <li>• Draft Minutes and Report</li> <li>• Establish MEC Panel and present Gantt chart on assessment process Make inputs on alignment</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>• Make inputs on assessment findings</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>• Make inputs on assessment findings</li> </ul>
		- Municipal Planners	<ul style="list-style-type: none"> <li>• Comment of assessment findings</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>• Make inputs on MEC Panel activities</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>• Make inputs on MEC Panel activities</li> </ul>



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<b>Phase 4: Adoption, submission and assessment of 2018/19 IDPs and submission of and commenting on draft 2019/20 Framework and Process Plans</b>	<b>31 October 2018</b>		
➤ <b>Municipalities adopt IDPs</b>	29 June 2018	- Municipal Councils	<ul style="list-style-type: none"> <li>• Ensure Council quorum</li> <li>• Resolve to adopt IDPs</li> </ul>
		- Municipal Planners	<ul style="list-style-type: none"> <li>• Ensure that adopted IDPs are submitted to COGTA with supporting documentation</li> <li>• Ensure that IDP is advertised to notify public of completion of IDPs</li> </ul>
➤ <b>Municipalities submit adopted IDPs to COGTA</b>	10 July 2018	- Municipal Planners	<ul style="list-style-type: none"> <li>• Deadline for submission of adopted IDP</li> </ul>
	June - July 2018	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Register adopted IDPs</li> <li>• Circulate submission confirmation letter to Municipalities</li> <li>• Cut CDs with adopted IDPs for distribution to MEC Panel</li> </ul>
➤ <b>Management of received IDPs and related documents (information management)</b>	16 - 20 July 2018	-MEC Panel	<ul style="list-style-type: none"> <li>• Collect CDs from IDP Coordination</li> <li>• Pre-assess reviewed IDPs based on IDP Assessment Criteria</li> </ul>
➤ <b>MEC Panel assess adopted IDPs, populate Templates, score IDPs and draft</b>	23 July - 3 Aug 2018	- MEC Panel (at decentralised venues)	<ul style="list-style-type: none"> <li>• Assess reviewed IDPs based on IDP and SDF Assessment Criteria</li> <li>• Fill-out of Templates</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

<p>paragraphs</p> <p>➤ <b>IDP Coordination finalise letters, assemble Templates and formulate Report</b></p>			<ul style="list-style-type: none"> <li>• Determine scores per KPA</li> <li>• Draft paragraphs</li> </ul>
	06 - 31 Aug 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Finalise letters and MEC sign</li> <li>• Finalise Report and MEC sign</li> <li>• Compile populated Templates and disseminate</li> </ul>
	06 - 31 Aug 2018	Spatial Planning Business Unit	<ul style="list-style-type: none"> <li>• Finalise paragraphs</li> <li>• Finalise Spatial DM Reports and disseminate</li> <li>• Compile populated SDF Templates and disseminate</li> </ul>
	28 Sept 2018	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Disseminate letters to Mayors</li> </ul>
<p>➤ <b>COGTA finalise comments on Draft Framework and Process Plans</b></p>	31 July 2018	- Municipal planners	Ensure that draft FPs/PPs are submitted to COGTA
	31 July - 28 Sept 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Receive and register draft FPs / PPs</li> <li>• Comment on Draft FPs/PPs and disseminate</li> </ul>
		- Spatial Planning Business Unit	<ul style="list-style-type: none"> <li>• Make SDF input into comments on draft FPs/PPs</li> </ul>
<p>➤ <b>IDP Indaba</b></p>	21 September 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Present major findings of Provincial MEC IDP Report focusing on KPAs</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>• Participate in proceedings</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>• Participate in proceedings</li> </ul>



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		- SOEs	<ul style="list-style-type: none"> <li>Participate in proceedings</li> </ul>
➤ <b>Finalisation of FP/PP</b>	31 October 2018	- Municipal Planners	<ul style="list-style-type: none"> <li>Advertise draft FP/PPs for 21 days</li> <li>Incorporate COGTA comments into draft FPs/PPs prior to adoption</li> <li>Forward copies of adopted FP and PP together with Council Resolution to COGTA</li> </ul>
		- Municipal Councils	<ul style="list-style-type: none"> <li>Adopt FPs/PPs</li> </ul>
		- IDP co-ordination	<ul style="list-style-type: none"> <li>Receive adopted FPs/PPs for record purposes</li> </ul>
<b>TASK</b>	<b>TARGET DATE</b>	<b>RESPONSIBILITY</b>	<b>ACTIVITY</b>
<b>Phase 5: World Planning Day; DGDP and IDP Alignment session</b>	<b>November 2018</b>		
➤ <b>World Planning Day Celebrations</b>	08 November 2018	- SAPI	<ul style="list-style-type: none"> <li>Logistics and invitations</li> </ul>
		- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Participate</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Participate</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Participate</li> </ul>
➤ <b>IDP Best Practice Conference and IDP Alignment session</b>	23 November 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Make logistical arrangements</li> <li>Hand out of certificates and trophies on 2018/19 IDP assessment results</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Participate in proceedings</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Participate in proceedings</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
		- SOEs	<ul style="list-style-type: none"> <li>Participate in proceedings</li> </ul>
<b>Phase 6: COGTA provide support to IDPs; IDP Stakeholders Meeting</b>	<b>November 2018 - March 2019</b>		
➤ <b>Provide support to Municipalities to improve IDPs</b>	November 2018 -March 2019	- IDP Co-ordination BU	<ul style="list-style-type: none"> <li>Ensure establishment of Project Steering Committee or equivalent body</li> <li>Participation in Planners Forum and RFs</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Establish and convene meetings of PSC, RF</li> <li>Draft the IDP</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Make input into IDPs</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>Make input into DPs</li> </ul>
➤ <b>IDP Stakeholders Meeting (on 2019/20 Reviewed IDP process)</b>	08 Feb 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Present, discuss and adopt reviewed Provincial IDP Management Plan</li> <li>Present, discuss and adopt reviewed IDP assessment criteria</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

			Management Plan and criteria
		- SOEs	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
<b>Phase 7: Submission Draft Reviewed 2018/19 Reviewed IDPs and WBPs to COGTA</b>	<b>29 March 2019</b>		
➤ <b>Submission Draft 2018/19 Reviewed IDPs to COGTA for assessment</b>	1 - 28 March 2019	- COGTA Planners	<ul style="list-style-type: none"> <li>Support Municipalities with completion of draft Reviewed IDPs</li> <li>Receive &amp; register draft Reviewed IDPs</li> </ul>
	1 - 28 March 2019	- Municipal Planners	<ul style="list-style-type: none"> <li>Finalise draft Reviewed IDPs into Process Plans &amp; IDP Assessment Criteria</li> <li>Finalise WBPs</li> <li>Align WBPs to IDP</li> <li>Submit Draft IDPs and WBPs</li> </ul>
	1 - 28 March 2019	- Sector Departments	<ul style="list-style-type: none"> <li>Make input into finalization of draft Reviewed IDPs</li> <li>Participate in IDP RFs and provide project and budget information</li> <li>Assessment of IDPs</li> </ul>
			- SOEs



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TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
			draft Reviewed IDPs <ul style="list-style-type: none"> <li>Participate in IDP RFs and provide project and budget information</li> <li>Assessment of IDPs</li> </ul>
<b>Phase 8: Convene Draft IDP assessment sessions; Convene IDP/DGDP Alignment Feedback session</b>	<b>11 May 2018</b>		
➤ <b>Draft IDP assessment sessions:</b> <ul style="list-style-type: none"> <li>Ugu</li> <li>Ethekwini &amp; Ilembe</li> <li>Umgungundlovu</li> <li>Harry Gwala</li> <li>King Cetshwayo</li> <li>Umkhanyakude</li> <li>Uthukela &amp; Amajuba</li> <li>Zululand</li> <li>Umzinyathi</li> </ul>	01 - 05 April 2019	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Collate e-copies for distribution to stakeholders</li> </ul>
		Sector Departments & SOE	<ul style="list-style-type: none"> <li>Copy e-copies from COGTA</li> </ul>
	<ul style="list-style-type: none"> <li>08 April 2019</li> <li>09 April 2019</li> </ul>	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Assessment of IDPs</li> <li>Fill out templates and disseminate to municipalities</li> </ul>
	<ul style="list-style-type: none"> <li>10 April 2019</li> <li>11 April 2019</li> </ul>	- Municipal representatives	<ul style="list-style-type: none"> <li>Receive populated assessment templates</li> <li>Incorporate comments into Final IDP.</li> </ul>
	<ul style="list-style-type: none"> <li>12 April 2019</li> <li>15 April 2019</li> <li>16 April 2019</li> </ul>	- Sector Departments	<ul style="list-style-type: none"> <li>Update baseline information</li> <li>Provide financial support for catalytic projects</li> <li>Provide alignment information and check if information provided in Nov. 2018 was included</li> </ul>





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	<ul style="list-style-type: none"> <li>• 17 April 2019</li> <li>• 18 April 2019</li> </ul>	- SOEs	<ul style="list-style-type: none"> <li>• Assessment of IDPs</li> <li>• Fill out templates</li> <li>• Provide alignment information and check if information provided in Nov. 2018 was included</li> </ul>
➤ <b>Draft WBPs assessment</b>	23 - 26 April 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Assessment of WBPs, including WBP alignment to IDPs</li> <li>• Fill out templates and disseminate to municipalities</li> </ul>
<b>TASK</b>	<b>TARGET DATE</b>	<b>RESPONSIBILITY</b>	<b>ACTIVITY</b>
➤ <b>IDP Alignment and Draft IDP assessment feedback sessions:</b> <ul style="list-style-type: none"> <li>• Umgungundlovu &amp; Harry Gwala</li> <li>• Ugu &amp; Metro</li> <li>• Umkhanyakude, KC &amp; Ilembe</li> <li>• Uthukela, Umzinyathi &amp; Amajuba</li> <li>• Zululand</li> </ul>	• 01 May 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Invite stakeholders</li> <li>• Draft Minutes</li> <li>• Make inputs on alignment</li> </ul>
	• 02 May 2019	- Sector Departments	<ul style="list-style-type: none"> <li>• Make inputs on assessment findings</li> </ul>
	• 03 May 2019	- SOEs	<ul style="list-style-type: none"> <li>• Make inputs on assessment findings</li> </ul>
	• 07 May 2019	- Municipal Planners	<ul style="list-style-type: none"> <li>• Arrange venue for session</li> <li>• Comment of assessment findings</li> </ul>
	• 08 May 2019	- Sector Departments	<ul style="list-style-type: none"> <li>• Make inputs on MEC Panel activities</li> </ul>



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TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
<b>Phase 9: Adoption, submission and assessment of 2018/19 IDPs and submission of and commenting on draft 2019/20 Framework and Process Plans</b>	<b>31 October 2019</b>		
➤ <b>Municipalities adopt IDPs</b>	28 June 2019	- Municipal Councils	<ul style="list-style-type: none"> <li>• Ensure Council quorum</li> <li>• Resolve to adopt IDPs</li> </ul>
		- Municipal Planners	<ul style="list-style-type: none"> <li>• Ensure that adopted IDPs are submitted to COGTA with supporting documentation</li> <li>• Ensure that IDP is advertised to notify public of completion of IDPs</li> </ul>
➤ <b>Municipalities submit adopted IDPs to COGTA</b>	08 July 2019	- Municipal Planners	<ul style="list-style-type: none"> <li>• Deadline for submission of adopted IDP</li> </ul>
	June – July 2019	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Register adopted IDPs</li> <li>• Circulate submission confirmation letter to Municipalities</li> <li>• Collate e-copies of adopted IDPs for distribution to MEC Panel</li> </ul>
➤ <b>Management of received IDPs and related documents (information management)</b>	17 - 19 July 2019	-MEC Panel	<ul style="list-style-type: none"> <li>• Copy e-copies from IDP Coordination</li> <li>• Pre-assess reviewed IDPs based on IDP Assessment Criteria</li> </ul>



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<ul style="list-style-type: none"> <li>➤ <b>MEC Panel assess adopted IDPs, populate Templates, score IDPs and draft paragraphs</b></li> <li>➤ <b>IDP Coordination finalise letters, assemble Templates and formulate Report</b></li> </ul>	22 July - 02 Aug 2019	- MEC Panel (at decentralised venues)	<ul style="list-style-type: none"> <li>• Assess reviewed IDPs based on IDP and SDF Assessment Criteria</li> <li>• Fill-out of Templates</li> <li>• Determine scores per KPA</li> <li>• Draft paragraphs</li> </ul>
	05 - 30 Aug 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Finalise letters and MEC sign</li> <li>• Finalise Report and MEC sign</li> <li>• Compile populated Templates and disseminate</li> </ul>
	05 - 30 Aug 2019	Spatial Planning Business Unit	<ul style="list-style-type: none"> <li>• Finalise paragraphs</li> <li>• Finalise Spatial DM Reports and disseminate</li> <li>• Compile populated SDF Templates and disseminate</li> </ul>
	27 Sept 2019	IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Disseminate signed letters to Mayors</li> </ul>
<ul style="list-style-type: none"> <li>➤ <b>COGTA finalise comments on Draft Framework and Process Plans</b></li> </ul>	31 July 2019	- Municipal planners	Ensure that draft FPs/PPs are submitted to COGTA
	31 July - 28 Sept 2018	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Receive and register draft FPs / PPs</li> <li>• Comment on Draft FPs/PPs and disseminate</li> </ul>
		- Spatial Planning Business Unit	<ul style="list-style-type: none"> <li>• Make SDF input into comments on draft FPs/PPs</li> </ul>
<ul style="list-style-type: none"> <li>➤ <b>IDP Indaba</b></li> </ul>	20 September 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Present major findings of Provincial MEC IDP Report</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

			focusing on KPAs
		- Municipal representatives	• Participate in proceedings
		- Sector Departments	• Participate in proceedings
		- SOEs	• Participate in proceedings
➤ <b>Finalization of FP/PP</b>	31 October 2019	- Municipal Planners	<ul style="list-style-type: none"> <li>• Advertise draft FP/PPs for 21 days</li> <li>• Incorporate COGTA comments into draft FPs/PPs prior to adoption</li> <li>• Forward copies of adopted FP and PP together with Council Resolution to COGTA</li> </ul>
		- Municipal Councils	• Adopt FPs/PPs
		- IDP co-ordination	• Receive adopted FPs/PPs for record purposes
<b>TASK</b>	<b>TARGET DATE</b>	<b>RESPONSIBILITY</b>	<b>ACTIVITY</b>
<b>Phase 10: World Planning Day; DGDP/IDP Alignment sessions</b>	<b>November 2019</b>		
➤ <b>World Planning Day Celebrations</b>	08 November 2019	- SAPI	• Logistics and invitations
		- IDP Co-ordination Business Unit	• Participate
		- Municipal representatives	• Participate
		- Sector Departments	• Participate
➤ <b>IDP Best Practice Conference and IDP Alignment session</b>	22 November 2019	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>• Make logistical arrangements</li> <li>• Hand out of certificates and trophies on 2019/12 IDP</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

TASK	TARGET DATE	RESPONSIBILITY	ACTIVITY
			assessment results.
<b>Phase 11: COGTA provide support to IDPs; IDP Stakeholders Meeting</b>	<b>November 2019 - March 2020</b>	- Sector Departments	Participate in proceedings
➤ <b>Provide support to Municipalities to improve IDPs</b>	November 2019 - March 2020	- SOEs	<ul style="list-style-type: none"> <li>Participate in proceedings</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Establish and convene meetings of PSC, RF</li> <li>Draft the IDP</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Make input into IDPs</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>Make input into DPs</li> </ul>
➤ <b>IDP Stakeholders Meeting (on 2019/20 Reviewed IDP process)</b>	07 Feb 2020	- IDP Co-ordination Business Unit	<ul style="list-style-type: none"> <li>Present, discuss and adopt reviewed Provincial IDP Management Plan</li> <li>Present, discuss and adopt reviewed IDP assessment criteria</li> </ul>
		- Municipal representatives	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
		- Sector Departments	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP Management Plan and criteria</li> </ul>
		- SOEs	<ul style="list-style-type: none"> <li>Participate in discussion and decision taking</li> <li>Adopt Provincial IDP</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

			Management Plan and criteria
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### SECTION 7: 2019/20 BUDGET PROCESS

Description	Responsibility	Quarter One		
		July 2018	August 2018	September 2018
<b>STAGE ONE Planning and Strategizing</b>	Mayor and Accounting Officer	<ul style="list-style-type: none"> <li>❖ Schedule key budget dates</li> <li>❖ Establish consultation forum</li> <li>❖ Commence Reviewing of policies</li> <li>❖ Reviewing of delegations as per the delegation policies</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> </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> <li>❖ Consider current</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

				economic and demographic trends
Quarter Two				
		October 2018	November 2018	December 2018
<b>STAGE TWO Preparation</b>	MAYOR, AO & CFO	<ul style="list-style-type: none"> <li>❖ Commence Preparation of departmental revenue and expenditure projection</li> <li>❖ Table draft budget policies to council for discussion</li> <li>❖</li> </ul>	<ul style="list-style-type: none"> <li>❖ Commence preparation of departmental operational plan, SDBIP's aligned to strategic priorities in IDP</li> <li>❖ Commence the process of budget adjustment 2016/17</li> </ul>	<ul style="list-style-type: none"> <li>❖ Table Draft policies to council for approval</li> <li>❖ Finalize the budget adjustment for 2018/19</li> <li>❖ Confirm approval of Rollovers - gazetted</li> <li>❖ Table budget adjustment to finance portfolio</li> <li>❖ Prepare conditional grants implementation plans</li> </ul>
Quarter Three				
Description	Responsibility	January 2019	February 2019	March 2019
<b>STAGE THREE Tabling to council</b>	Mayor, AO and CFO	<ul style="list-style-type: none"> <li>❖ Table Adjusted Budget 2018/19 , SDBIP and section 57 performance agreements to council for approval(Schedule B format)</li> <li>❖ Table MID Year performance report, AG Report &amp; Annual report to council</li> <li>❖ Advertise, Budget adjustment, draft</li> </ul>	<ul style="list-style-type: none"> <li>❖ Confirm 2017/18 allocations from NT, PT &amp; district municipality and incorporate allocation to the draft budget 2017/18</li> <li>❖ Submit Annual report to AG, PT &amp; provincial department responsible for local government</li> <li>❖ Submit Adjusted</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 2017/18</li> <li>❖ Submit tabled annual budget</li> </ul>



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		annual report invite public for comments	Budget to NT & PT	to NT, & PT ❖
<b>Quarter Four</b>				
Description	Responsibility	April 2019	May 2019	June 2019
<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 2017/18</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 (section 52 )</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> </ul>	<ul style="list-style-type: none"> <li>❖ Approve 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> <li>❖ Submit Municipal Banking Details to NT</li> <li>❖ Advertise the final budget, SDBIP &amp; performance agreements in the municipal website</li> </ul>





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### SECTION 8: 2019/20 IDP, PMS AND BUDGET BROAD ACTION PLAN

1 <sup>st</sup> Quarter	IDP	OPMS	BUDGET
<b>JULY</b>	<ul style="list-style-type: none"> <li>❖ IDP implementation</li> <li>Preparation of the Process Plan and the Framework</li> <li>Plan Submission of the IDP Process Plan for assessment by the DLGTA</li> </ul>	4 <sup>th</sup> quarterly review due (2017/18)	<ul style="list-style-type: none"> <li>❖ Commence planning for next three years budget, reviews of IDP and budget policies and consultation in accordance with budget process co – ordination role,</li> <li>❖ Review previous year budget evaluation checklist, council delegations and budget time schedule of key deadlines</li> <li>❖ Review delegation and all budget related policies including review tariff, rates, credit control and supply chain management and cash</li> </ul>



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			<p>management/investment policies</p> <ul style="list-style-type: none"> <li>❖ Establish department budget committees to include portfolio councillors and official and delegation in accordance with delegation policy</li> </ul>
<b>AUGUST</b>	IDP Process Plan for 2019 finalized and adopted by the Council.	Launch campaign to publish performance	<ul style="list-style-type: none"> <li>❖ Table in council budget and IDP time table schedule of key deadlines(include timing for development of policies and process of consultation</li> <li>❖ Mayor to establish 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</li> <li>❖ Advertise budget and IDP time schedule in terms of budget consultation policy</li> </ul>
<b>SEPTEMBER</b>	Implementation of the IDP Process Plan <b>IDP Representative Forum Meeting</b> Commencement of IDP <b>Analysis and Strategies Phase</b>	First quarterly review due	<ul style="list-style-type: none"> <li>❖ Determination of revenue projections and draft initial allocations to powers and functions and departments Implementation budget and IDP time schedule of key deadlines</li> </ul>

2 <sup>nd</sup> Quarter	IDP	OPMS	BUDGET
<b>OCTOBER</b>	Evaluation of changed		❖ Next three year budget-



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

	<p>circumstances Continuation of development of objectives and strategies Development of sector Plans initiation</p>	<p>Inform the IDP Preparation Process of KPA, objectives and strategies</p>	<p>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)</p> <ul style="list-style-type: none"> <li>❖ Conclude the first draft and policies for initial council discussion as per MFMA guide</li> </ul>
<b>NOVEMBER</b>	<p>Continuation of development of objectives and strategies</p>	<p>Inform the IDP Preparation Process of KPA, objectives and strategies</p>	<ul style="list-style-type: none"> <li>❖ 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</li> </ul>
<b>DECEMBER</b>	<p>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</p>	<p>Inform the IDP Preparation Process of KPA, objectives and strategies</p>	<ul style="list-style-type: none"> <li>❖ Finalize first draft of departmental operational plans and services delivery and budget implementation plan for review against strategic priorities as per MFMA guide</li> </ul>

3 <sup>rd</sup> Quarter	IDP	OPMS	BUDGET
<b>JANUARY</b>	Continuation of Projects Planning	Bi-annual report	<ul style="list-style-type: none"> <li>❖ Notes the president's state of the address for further budget</li> </ul>



## UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)

	Continuation of Sector Planning	preparation	<p>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</p> <ul style="list-style-type: none"> <li>❖ Tabling (Proposed National and Provincial allocations for three years must be made available by 20 January of each year) <b>MFMA s 36</b></li> </ul>
<b>February</b>	<b>IDP</b>	<b>OPMS</b>	<b>BUDGET</b> <ul style="list-style-type: none"> <li>❖ Note national budget for provincial and provincial allocations to municipalities for incorporation into budget</li> <li>❖ Accounting officer should table adjustment budget as per MFMA section 28</li> </ul>
<b>MARCH</b>	<b>IDP Alignment Meeting</b> convenes at KCDM	Finalization of customer and employee survey	<ul style="list-style-type: none"> <li>❖ Accounting Officer should receive the notification of any transfers that that will be made to the municipality from other municipalities in each of the next three financial year as per MFMA section 37(2)</li> <li>❖ Table in council the draft annual budget and all supporting document as</li> </ul>



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			<p>section 16(2)17 &amp; 87 (3)</p> <ul style="list-style-type: none"> <li>❖ Publicize 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</li> </ul>
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4 <sup>th</sup> Quarter	IDP	OPMS	BUDGET
<b>APRIL</b>	Advertisement of final draft IDP for public comment Assessment of the IDP by sector departments	3 <sup>rd</sup> quarterly review due	<ul style="list-style-type: none"> <li>❖ 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</li> <li>❖ Confirm provincial and national allocations</li> </ul>

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 sector departments <b>IDP Representative Meeting</b> convenes Council adoption of IDP	Service and scorecards targets set for the next financial year Annual strategic targets broken down to quarterly targets	<ul style="list-style-type: none"> <li>❖ 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</li> <li>❖ Accounting Officer assists the Mayor in preparing the final budget documentation for</li> </ul>



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	document		<p>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</p> <ul style="list-style-type: none"> <li>❖ 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></li> </ul>
<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	<ul style="list-style-type: none"> <li>❖ 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></li> <li>❖ Accounting Officer of the Municipality publishes adopted budget and Plans – <b>MFMA s 69; MSA s57</b></li> <li>❖ Accounting Officer submits to the Mayor no later than 14 days after approval of the</li> </ul>



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			<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> <ul style="list-style-type: none"> <li>❖ 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</li> <li>❖ 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></li> <li>❖ Council finalizes a system of delegations – <b>MFMA s 59, 79, 82; MSA s 59-65</b></li> </ul>
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## **UMFOLOZI MUNICIPALITY: IDP REVIEW PROCESS PLAN (2019/20)**