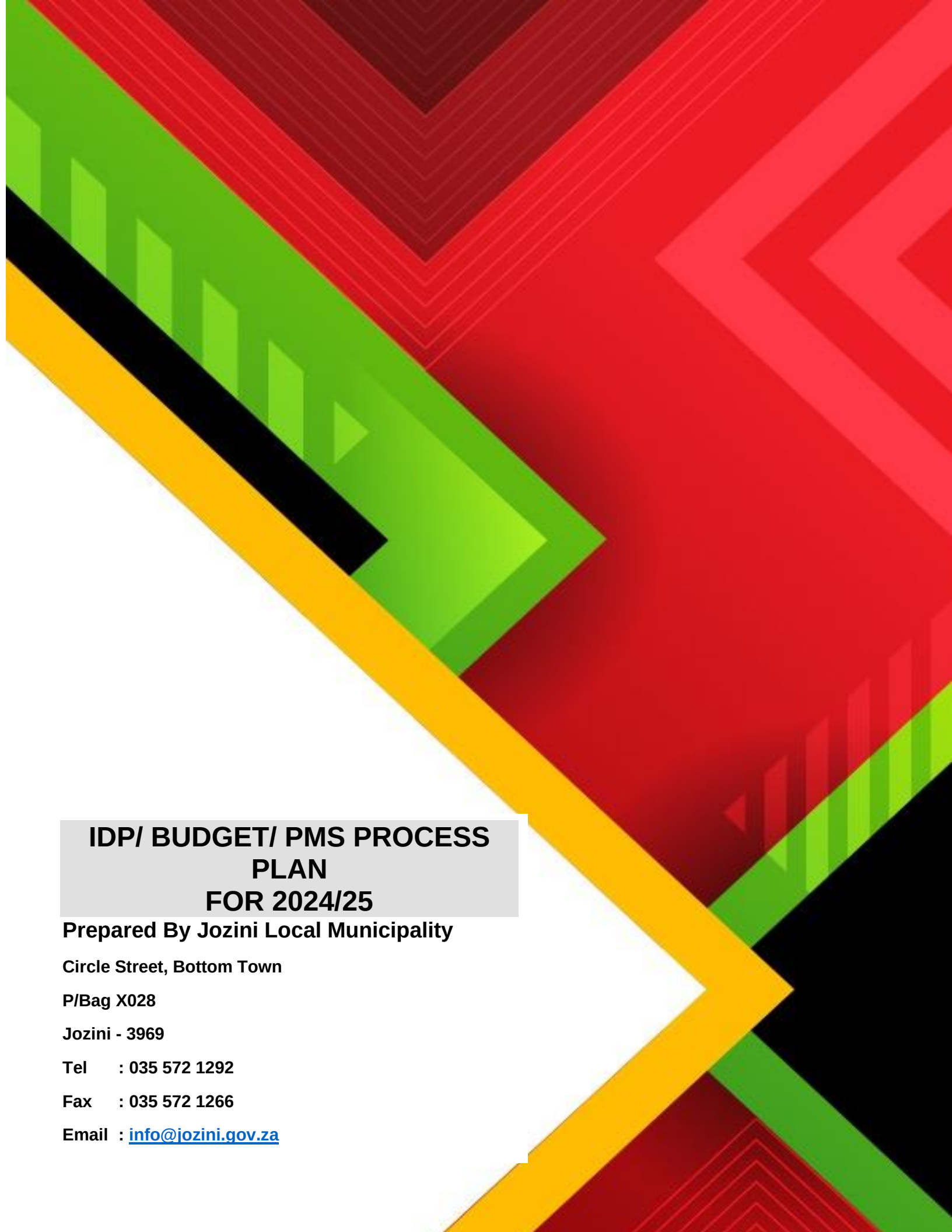




IDP/ BUDGET/ PMS PROCESS PLAN FOR 2024/25

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1. INTRODUCTION: IDP REVIEW PROCESS

In order for the Jozini Municipality to ensure certain minimum quality standards of the Integrated Development Plan (IDP), and a proper coordination between all spheres of government (National, Provincial and Local), the preparation of the Process Plan has been regulated by Section 28 of the Municipal Systems Act No.32 of 2000.

The preparation of a Process Plan, which is in essence the IDP Process set out in writing and requires the adoption by Council.

This plan has to include the following:

- ✚ **Time Frames:** A programme specifying the time frames for the different phases of the IDP preparation;
- ✚ **Consultation:** Appropriate mechanisms, processes and procedures for consultation and participation of local communities, organs of state, traditional authorities, and other role players in the IDP preparation process;
- ✚ **Organisational arrangements:** An indication of the organisational arrangements for the IDP process;
- ✚ **Policy and Legislation:** Binding plans and planning requirements, i.e. policy and legislation; and
- ✚ **Alignment:** Mechanisms and procedures for vertical and horizontal alignment.

2. LEGISLATIVE FRAMEWORK

In terms of Chapter 5 of the Municipal Systems Act No. 32 of 2000, all categories of Municipalities in South Africa, ranging from Metropolitans, District Municipalities and Local Municipalities are required to compile a five-year strategic plan (IDP's) stretching from 2022 to 2027 and review these plans annually.

In terms Section 26 of the Municipal Systems Act No.32 of 2000, the core components of integrated development plans must indicate that:

An integrated development plan must reflect-

- a) The municipal council's vision for the long-term development of the municipality with special emphasis on the municipality's most critical development and internal transformation needs;*
- b) An assessment of the existing level of development in the municipality, which must include an identification of communities which do not have access to basic municipal services;*
- c) The council's development priorities and objectives for its elected term, including its local economic development aims and its internal transformation needs;*
- d) The council's development strategies which must be aligned with any national and provincial sectoral plans and planning requirements binding on the municipality in terms of legislation;*
- e) A spatial development framework which must include the provision of basic guidelines for a land use management system for the municipality;*
- f) The council's operational strategies;*
- g) Applicable disaster management plans;*
- h) A financial plan, which must include a budget projection for at least the next three years; and*
- i) The key performance indicators and performance targets determined in terms of section 41.*

The review of the IDP process is a legislative requirement in terms of Section 34 of the Municipal Systems Act No. 32 of 2000. Section 34 (a) stipulate that, the municipal Council must review Integrated Development Plan (i) annually in accordance with an assessment of its performance measurements in terms of section 41; and (ii) and to the extent changing circumstances so demand; and may amend its development plan in accordance with a prescribed process.

The preparation of the Process Plan is the legislative requirements of section 28 of the Municipal Systems Act No. 32 of 2000 which reads thus:

Adoption of process-

28 (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, adoption and review of its Integrated Development Plan.

The main aim of the Process Plan is to create a frame where amendments and enhancement of the IDP can take place as new information becomes available through the lead projects that are being executed. Findings from these projects will place more emphasis on matters that need immediate attention, changing the priorities of the IDP.

The Process Plan document deals with the following aspects:

- ✚ Consideration, inclusion of any relevant and new information;
- ✚ An overview of the IDP Review;
- ✚ The time schedule for planning process;
- ✚ Roles and responsibilities;
- ✚ An approach to public participation;
- ✚ Institutional structures to be established for management of the process; and
- ✚ How the process will be monitored.

The following matters will be clarified during 2024/25 IDP Review Process:

- ✚ The alignment of powers and functions between the district municipality and the local municipality.
- ✚ The preparation of Process Plan with relevant sector plans and its alignment with the IDP.
- ✚ Alignment of Capital budget and Operational budget within the prioritized programmes and projects.
- ✚ Skills development and Employment Equity will be further enhanced.
- ✚ The development of user-friendly Organizational Performance Management System.

The adopted Process Plan will be submitted to the MEC for Cooperative Governance and Traditional Affairs for scrutiny.

3. KEY ELEMENTS OF IDP REVIEW PROCESS

In order to achieve the best IDP Review results, the IDP Review requirements need to be taken into consideration by:

- ✚ Ensuring the proper co-ordination between all spheres of government (Local and Provincial).
- ✚ Ensuring the IDP alignment within the District Municipality, other Local Municipality as well as Sector departments regarding development strategies, development objectives, programmes, projects and relevant sector plans.
- ✚ Ensuring the full involvement of Councillors and their constituent communities.

3.1. IDP Review Process

This is the second review of the fifth generation IDP Process (2022-27). The following aspects need to be considered:

- ✚ IDP alignment with the District and other Local Municipalities, Sector departments, and other relevant IDP Review Stakeholders.
- ✚ MEC for Cooperative Governance and Traditional Affairs for assessment and comments will be considered as part of the IDP Review process.

3.2. Draft IDP Assessment

The Department of Cooperative Governance and Traditional Affairs customized the IDP assessment & management support plan and framework plan, which have to be used by all 61 municipalities in KwaZulu-Natal when preparing their IDP's for each financial year.

This framework plan and management support plan are regarded as a guide to that municipalities have to follow when preparing their IDP's. In order for the Department of Local Government and Traditional Affairs to find out if the municipalities have prepared their IDP's according to the management plans, they arrange the IDP's assessment week which normally take place between March and April of each and every financial year.

The assessments are done in accordance with the five (6) National Key Performance Areas. The draft IDP assessment assists the municipalities on areas that need urgent attention before final IDP submission.

3.3 MEC Panel Comments

In terms of Section 32 (1) (a) The Municipal Manager must submit a copy of the integrated development plan as adopted by council of the municipality and any subsequent amendment to the plan, to the MEC for local government in the province within 10 days of the adoption or amendment of the plan.

The main purpose for IDP submission to the MEC Panel is for their final assessment before the implementation of the IDP. The 2023/24 IDP MEC's comments will be addressed in 2024/25 IDP Review process.

3.4 Inclusion of new Information

- ✚ Addressing areas requiring additional attention in terms of legislative requirements not addressed during the previous years of the IDP Review Process (i.e. MFMA);
- ✚ with newly completed Sector Plans (LED Strategy, HIV/AIDS Strategy and Tourism Strategy);
- ✚ Review of the Strategic elements of the IDP;
- ✚ Alignment of the Jozini Local Municipal Performance Management System (PMS), in terms of Chapter 6 of the MSA, with the IDP;
- ✚ The update of the Financial Plan, the list of projects (both internal and external funded), and the capital investment framework.

3.5 Alignment with Service Providers

Alignment with Service Providers is essential in order that the District Municipality and Local municipalities priorities can be reflected in their project prioritisation process, as well as so that their projects can be reflected in the IDP documentation.

3.6 IDP/Budget Alignment

There will always be a link between Municipal IDP and Municipal Budget. Chapter 4 and Section 21 (1) of the Municipal Finance Management Act No.56 of 2003 indicate that:

“the Mayor of the Municipality must”:

- a) *co-ordinate the processes for preparing the annual budget and for reviewing the municipality's integrated development plan and budget –related policies to ensure that the tabled budget and any revisions of the integrated development plan and budget-related policies are mutually consistent and credible:*
 - b) *at least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for-*
 - i) *preparation, tabling and approval of the annual budget:*
 - ii) *the annual review of*
 - aa) *the integrated development plan in terms of section 34 of the Municipal Systems Act; and*
 - bb) *the budget –related policies;*
 - iii) *the tabling and adoption of any amendments to the integrated development plan and the budget –related policies and;*
- any consultative process forming part of the processes referred to in subparagraphs (i), (ii) and (iii).*

4. ROLES AND RESPONSIBILITIES

The IDP review process involves many participants with different roles and responsibilities to attend to.

The participants in the IDP review process varies from broad public, IDP Representative Forum, IDP Steering Committee, Municipal Manager, Ward Councillors, Community Development Workers, Ward Committees, Executive Committee, Council, Traditional Council and Provincial Multi-Sectoral IDP Forum.

The participation of all the above-mentioned stakeholders is regarded as very important, attempting to involve all levels of public in the consultative part of the process. All members of the public have the opportunity to register as IDP Representative Forum members, allowing them to participate in the review process.

Forum members are also requested to participate in Task Teams, in the respective fields of their interest. Task Teams will be formed according to six Key Performance Areas which are:

- ✚ Institutional Development
- ✚ Basic service delivery;
- ✚ Socio economic development
- ✚ Good Governance and public participation
- ✚ Financial Management
- ✚ Spatial Development and Environmental Planning (Cross Cutting)

4.1. Role Players

The following are the role players in the IDP process:

- ✚ Council and the Executive Committee;
- ✚ Mayor;
- ✚ Municipal officials;
- ✚ Municipal Manager / IDP Manager;
- ✚ IDP Steering Committee;
- ✚ Representative Forum;
- ✚ The District Municipality;
- ✚ Relevant Government Departments; and
- ✚ Broad Public/ Civil Society.
- ✚ Amakhosi

Alignment meetings with neighbouring municipalities will take place to ensure that synergy occurs on all levels between the various local IDP documents and align with the IDP

Review document of the District Municipality in order to achieve more support on the regional scale.

5. PARTICIPANTS IN THE IDP/ BUDGET REVIEW PROCESS

5.1. Steering Committee

The SC will be chaired by the Mayor and in his absence, by the Municipal Manager/ CFO. Members of the Budget SC will comprise the Mayor, Speaker, Whips of the Municipal Council, Accounting Officer, CFO, HOD's and their budget staff, IDP Manager, PMS Manager, SCM Manager and Technical staff (2) of the BTO.

5.2. Broad Public/Civil Society

It is required in terms of Section 16 (1) of Chapter 4 of the Municipal Systems Act No. 32 of 2000 that, the local authority must accomplish extensive public participation during the duration of the IDP Review process.

The Local Authority will invite all interested parties to become involve in twenty (20) identified public information meetings in order to determine where they wish to participate in the formulation of the IDP document.

The Municipality will notify all interested parties about the preparation if it's IDP Review via the following modes of communication:

- ✚ Fliers will be placed on Municipal notice board, Municipal library, Traditional Council offices, schools and shops;
- ✚ Local newspapers (Isolezwe, Ilanga and Zululand Observer);
- ✚ Radio Stations (Maputaland Community Radio Station); and
- ✚ Municipal Website

5.3. IDP Representative Forum (RF)

The creation of IDP Representative Forum is one of the mechanisms that, the Municipality will use to promote major public participation in the IDP Review Process.

The IDP Representative Forum will be made up of the following members:

- ✚ Councillors;
- ✚ Traditional Leaders;
- ✚ Community Development Workers;
- ✚ Managers;
- ✚ All relevant representatives from organized stakeholder's groupings.

The Mayor will be the Chairperson of the Forum.

The Forum will represent the interest of the community and act as a vehicle for discussions and communication between all stakeholders.

5.4. Office of the Municipal Manager: IDP Manager (In-House)

This office will serve as the driver responsible for the whole IDP Review Process which amongst others contains:

- ✚ Formulation of the IDP Process Plan;
- ✚ Ensuring the involvement of all relevant stakeholders and role players in the IDP Review Process;
- ✚ Nominating people to be responsible for certain specific actions;
- ✚ Oversee that the process ensures adherence to the given time frame and budget; and
- ✚ Keep abreast with any further required amendments, additions or improvements to the IDP Review Process.

5.5. Office of the Speaker: Public Participation Section

This office will make sure that all councilors, ward committees and Community Development Workers fully participate in the Review Process. Ensuring that projects proposals are integrated with cross cutting dimensions such as Gender Equity, Employment Equity and addressing HIV/AIDS. This office will also be responsible for compiling Ward Based Plans which will inform the IDP.

5.6. Finance Department

This department will provide the relevant financial information for priority issue analysis as well as provide with departmental operational; and capital budget information.

5.7. Municipal Manager

The Municipal Manager is responsible for leading the IDP Review Process and to achieve co-ordination of all the actions during the processes and is accountable for the entire IDP Review Process.

5.8. Councillors

Councillors are regarded as a very important link between the public in each Municipal Ward and the Municipal Officials, encouraging participation of ward members in the IDP Review Process. Ward Councillors are also representing the community in all decision-making processes of Council.

Regular communication with Ward Councillors concerning the IDP process will improve the commitment of the public.

The newly elected Councillors will receive trainings on municipal affairs.

5.9. Community Development Workers and Ward Committee Members

The CDW and Ward Committees are regarded as the link between communities and all organs of government, encouraging full community participation in the IDP Review process to strengthen its implementation.

5.10. Executive Committee and Council

The Council and Executive Committee are regarded as the decision-making institution of the Local Authority, which finally adopts the proposals concerning the IDP Process.

The adoption of the Process Plan for the IDP review and the final adoption of IDP Review rests with the Executive Committee and Council.

6. METHODOLOGY

6.1. IDP Process Plan

- ✚ Ensuring the proper approach to public participation.
- ✚ How the IDP process will be monitored.
- ✚ Time schedule for the planning process.
- ✚ Structures to be established for public participation.
- ✚ Ensuring the support of all relevant stakeholders.

Outputs

- ✚ Assessment of existing level of development.
- ✚ Identification of priority issues and problems.
- ✚ Assessment and attending the MEC Review comments.

6.2. Data Collection

- ✚ Collection of relevant information that will inform the preparation and assessment of the IDP and its review.

Outputs

- ✚ Collection of new information available within the municipality that could inform the new development strategies.
- ✚ Collection of information regarding the funded projects and their allocations by spheres of government and funding agencies.

6.3. IDP Review

- ✚ Inform the municipal budget.
- ✚ Prepare revised priority projects list.
- ✚ Preliminary identification of development issues.

Outputs

- ✚ Accommodation of new projects.
- ✚ Assessment of existing prioritized projects.
- ✚ Preparation of an Implementation strategy.
- ✚ Assessment of implementation of approved projects.
- ✚ Submission of draft IDP Review to DCOGTA for assessment and MEC comments.

6.4. Adoption Process

- ✚ Adoption of the Jozini Local Municipality Final IDP by Council.

Outputs

- ✚ Submission of Draft IDP Review to Council to obtain approval within the prescribed period.
- ✚ Advertise Draft IDP Review for public comments.
- ✚ IDP Forum to consider the public presentation/comments.
- ✚ Amend the Draft IDP Review with comments from public.
- ✚ Submission of amended Draft IDP Review to Council for adoption.
- ✚ Submission of Final IDP to DCOGTA for assessment by the MEC as the requirement of Section 32 (1) (a).

No.	Activities/Phases	Amount	July 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	June 24
1	Phase 1: Preparation	R5 000.00												
	Development of Process Plan													
	Integration of IDP and Budget													
	Council Adoption and Advertising of the Process Plan													
2	Phase 2: Analysis	R955 000.00												
	Compilation of Existing Information													
	Reconciliation of Information													
	Identification of Priority Issues													
	Municipality wide Analysis													
	Public Consultative Meetings													
3	Phase 3: Strategies	R150 000												
	Municipal Vision, Mid-term Objectives and Development Strategies													
	Identification of Priority Projects													
	Public Debate on Priority Projects & Strategies													
4	Phase 4: Projects	R0												
	Identification of Projects													
	Designing of Projects Proposals													
	Preparation of Implementation Plans for Priority Projects													
6	Phase 5: Integration	R0										The integration phase will be taking place in all phases		
	Preparation of an Operational Strategy													
	Preparation of Integrated Programmes													
	Finalisation of Draft IDP Document													
7	Phase 6: Approval	R750 000												
	Opportunities for Comments by Provincial/National Departments & Parastatals													
	Incorporating & Responding to Comments from Provincial/National Departments & Parastatals													
	Opportunity for Public Comments													
	Incorporating & Responding to Public Comments													
	Amendments/Completion of Review Process and Final Adoption by Council & Submission to DCOGTA													
8	Total Amount	R1 500 000.00												



Jozini IDP and SDF is prepared and reviewed in-house.

NO	DESCRIPTION OF ACTIVITY	TARGET DATE
1.	Commence the Planning for 2024/25 budget, reviews of IDP and Budget policies and consultation- review previous year's budget evaluation checklist, council delegations and budget time schedule of key deadlines	31 August 2023
2.	Commence Planning to review delegations and all budget related policies including the review of tariffs, credit control, supply chain and cash management/ investment policies, funding and reserves policies, long term financial planning, borrowings policy, infrastructure investment and capital projects policy, asset disposal policy, indigent policy, ect.	31 August 2023
3.	Tabling of the Process plan to Council.	31 August 2023
4.	Advertise budget/ IDP time schedule for public knowledge	7 September 2023
5.	Commence the process of review of the IDP and service delivery mechanism	17 September 2023
6.	Commence the process of determining strategic objectives that are measurable for service delivery and development including backlogs for next three-year budget.	17 September 2023
7.	Ensure internal analysis of financial and non-financial performance over year are prepared, analyse gaps between actual and planned performance, assess impact of plans. Determine financial position and assess financial capacity against future strategies.	17 September 2023
8.	IDP Indaba	22 September 2023
9.	Implement budget and IDP time schedule of key deadlines	30 September 2023
10.	Submission of PMS Q1 Report to Internal Audit	29 October 2023
11.	Conclude initial consultation and review, confirm priorities, identify other financial and non-financial budget parameters including government allocations to determine revenue envelope and financial outlook to identify need to review fiscal strategies.	29 October 2023
12.	Commence community and stakeholder consultation process, review inputs, financial models, assess impact on tariffs and charges and consider funding decisions.	29 October 2023
13.	Conclude first draft policies for initial council discussions.	29 October 2023
14.	IDP Best Practice Conference	24 November 2023
15.	Finalise first draft of departmental strategies, operational plans for review against strategic priorities.	15 December 2023
16.	Adjust estimates based on plans and resources.	15 December 2023
17.	Finalise inputs from bulk resource providers and agree on proposed price increase	12 January 2024
18.	Review whether all bulk resource providers have lodged a request with National Treasury and SALGA seeking comments on proposed price increases of bulk resources.	12 January 2024
19.	Submission of Quarter 2 PMS report to Internal Audit.	15 January 2024
20.	Note the President's State of the Nation Address (SONA) for further budget priorities informed by National priorities per SONA.	31 January 2024

21.	Finalise detailed operating and capital budgets and IDP in the prescribed formats by National Treasury and COGTA with all supporting schedules substantially completed including budget assumptions, overview of budget process plan etc incorporating National and Provincial budget allocations, integrate and align to IDP document and finalise all budget related policies. Obtain the budget checklist from PT and COGTA to check against the municipal draft budget and IDP to ensure that all necessary information accompanying the budget and IDP is of a good quality.	31 January 2024
22.	Report to Council on status of the draft 2024/25 IDP and Budget including the tabling of capital projects and delayed projects to be approved by Council for consideration in the budget for 2024/25, 2022/23 Annual Report (i.e. including 2022/23 Annual Financial Statements, Auditor General's Report) and summarise overall findings of previous year's Annual Performance Report- reinforce upcoming process for budget approval and oversight.	31 January 2024
23.	Prepare the mid- year Budget and Performance assessment report.	25 January 2024
24.	IDP Stakeholders Engagement	02 February 2024
25.	Finalise the Budget Adjustment	28 February 2024
26.	Receive budgeted plans and projects from the Sector departments.	05 March 2024
27.	Note the State of the Province Address (SOPA) by the Premier for further Provincial Priorities to be considered.	28 February 2024
28.	Commence the preparation of all MIG funded capital projects business plans, designs, etc to ensure timely commencement of implementation and prepare cash flow projections per each capital project and plan for the early commencement of their actual construction.	01 March 2024
29.	Receive notification of any transfers (if any) that will be made to the municipality from other municipalities in each of the next three financial years.	16 March 2024
30.	Receive bulk resource providers' price increases as tabled in Parliament or Provincial Legislature.	16 March 2024
31.	Receive revised budget from sector departments.	21 March 2024
32.	Incorporate changes (if any) from sector departments and municipalities.	21-22 March 2024
33.	Consider the salary increment in budget of employees emanating from agreements between SALGA and municipal unions and expected upper limits of Councillors.	21 March 2024
34.	Table the draft budget with all documents and all budget related policies to the Steering Committee for inputs	22 March 2024
35.	Distribute the agenda for Draft Budget and IDP together with supporting documents	23 March 2024
36.	Tabling of draft Budget and IDP to Council.	31 March 2024

37.	Forward the format of the Procurement Plan to all HODs to start planning for their procurement to ensure early commencement of budget implementation to fast track 2024/25 budget implementation.	4 April 2024
38.	Make public the tabled draft budget and IDP and accompanying documentation, invite the community to submit representation and submit to PT, NT, COGTA and other affected organs of state. This notification must include all scheduled dates for the programme of the budget and IDP road shows	4 April 2024
39.	Commence the process of consulting with the community on tabled draft budget and IDP to conduct public hearing and meetings in different wards PT, NT and other organs of the state making a budget submission. Publish the ward-based information for ward councillors.	15 April 2024
40.	Confirm provincial and national budget allocations.	20 April 2024
41.	Submission of Quarter 3 PMS report to Internal Audit.	20 April 2024
42.	Review provincial and national legislation including DORA establish potential new reporting requirements including annual, monthly and quarterly grant and performance report specific ne allocations/programmes	30 April 2024
43.	Conclude the process of consultation on tabled draft budget and IDP with the community and other stakeholders and consider the revision of the budget following the feedback and considering the results of the third quarterly (section 52) report.	04 May 2024
44.	Coordinate the submission of procurement plans for 2024/25 and review them thereof.	14 May 2024
45.	Consider the reviews of the community and other stakeholders on draft budget and IDP.	09- 13 May 2024
46.	Respond to submissions received and if necessary, revise the budget and table amendments for council consideration.	17 May 2024
47.	Review any comments received from PT and NT on the draft budget	17 May 2024
48.	Table the budget and IDP to finance Portfolio committee and EXCO for final input	23 May 2024
49.	Print the agenda and distribute to councillors the budget, IDP and draft SDBIP in preparation for the meeting of the final adoption of the budget and IDP.	24 May 2024
50.	Table the final annual budget and IDP before council.	31 May 2024
51.	Approve annual budget and IDP by council resolution including tariffs, credit control and debt collection budget, SCM, funding and reserves, long term financial planning, all other policies etc, measurable performance objectives service delivery agreements and long-term contracts where applicable.	31 May 2024
52.	Coordinate the commencement of the procurement process e.g. drawing up of tender documents, specifications, advertising, evaluation, adjudication, appointment of service provider and	01 June 2024

	signing of contracts, SLAs etc in preparation for early implementation of 2024/25 budget.	
53.	Submit approved budget with all supporting documents, budget related policies and IDP together with council resolution on approving the budget the budget and IDP to PT and NT	03 June 2024
54.	Advertise the approved budget and IDP in the local Newspaper	03 June 2024
55.	Submit certification to PT certifying that the approved budget has been captured and protected from any amendment to financial system	14 June 2024
56.	Submit 2024/25 draft SDBIP to the mayor	30 May 2024
57.	Approve 2024/25 draft SDBIP submitted by the municipal manager	20 May 2024
58.	Submit approved Final SDBIP by the mayor to PT	30 June 2024
59.	Sign performance agreement of the municipal manager for next year	06 July 2024
60.	Submit signed annual performance agreements for next year to the mayor for all other section 56 employees	13 July 2024
61.	Table before council for adoption annual performance agreements of all section 56 employees SDBIP and PMS Framework policy	30 June 2024
62.	Make Public approved SDBIP, performance Agreements of all sections 56 employees and PMS framework and policy	30 August 2024
63.	Forward copies performance Agreements of all section 56 employees to the MEC responsible for local government in the province	30 August 2024