



PORT ST JOHNS
• MUNICIPALITY •
OUR HERITAGE, OUR PEOPLE

2024/25 IDP, BUDGET & PMS PROCESS PLAN

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CHAPTER 1: BACKGROUND AND LEGAL FRAMEWORK

1.1 Background

The Process plan is an organized activity plan that outlines the process of development of the IDP/Budget and Performance. This process plan outlines the manner in which the 2024/25 IDP review and Budget process will be undertaken. It further substantiates the need for increased citizen involvement through municipal driven structures such as Ward Committees and various representative forums. It is important to bear in mind that the end result of the IDP process is not the adoption of the IDP and Budget, but the actual implementation of projects which will ultimately improve the conditions in which the residents of Port St. Johns live. Section 153 of the Constitution of the Republic of South Africa provides that a municipality must "structure and manage its administration and planning processes to give priority to the basic needs of the community and to promote the social and economic development of the community". This constitutional provision illustrates the need for integrating the planning, budgeting, implementation and reporting processes of all public institutions.

The Integrated Development Plan (IDP) is the Municipality's principal strategic planning document. The IDP and the budget processes are two distinct but essentially interrelated processes which must be coordinated to ensure that the IDP and budget related policies and the tabled budget are mutually consistent and credible. The IDP ensures close co-ordination, alignment and integration between priorities, projects, programs and activities, both internally between directorates and externally between stakeholders and other spheres of government.

The Port St. Johns Municipal Council is required to adopt a process plan that will guide the planning process, drafting and review of the IDP, which will include the following:

- A programme specifying timeframes for the different planning phases;
- Appropriate mechanisms, processes and procedures for consultation with and participation of local communities, organs of state, traditional authorities, and other stakeholders in the IDP process; and
- The identification of all plans and planning requirements binding on the Municipality in terms of provincial and national legislation.

The process plan will lead to the adoption of the final IDP by Council in May 2024 along with the 2024/25 MTREF Budget.

1.2 Legal Framework

Section 28 of the Municipal Systems Act, No. 32 of 2000 states that 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 and consult the local community before adopting a process

The Process Plan fulfils the role of a business plan or an operational framework for the IDP and budget review. It outlines the manner in which the IDP and Budget processes will be undertaken to such extent that it indicates what has to happen when, the responsible person, where it will happen and who will be the stakeholders.

Drafting an IDP requires a comprehensive planning process. A wide range of role-players from inside and outside the Municipality are required. Such a process has to be properly organized and prepared. This preparation is the duty of the Municipal Manager and Senior Management. The preparation process is referred to as the "*Process Plan*" and should contribute to the institutional preparedness of the Municipality for the Integrated Development Planning Process.

In order to ensure that the Integrated Development Planning process complies with minimum quality standard and that proper co-ordination between and within the spheres of government is established, the preparation of the Process Plan is regulated by the Municipal Systems Act, 2000 and its regulations.

1.2.1 Integrated Development Plan

Section 25 (1) of the Municipal Systems Act 32 of 2000 (chapter 5 thereof) indicates that: *Each Municipal council must, within a prescribed period after the start of its elected term, adopt a single, all-inclusive and strategic plan for the development of the municipality which-*

- a. *Links, integrates and coordinates plans and takes into account proposals for the development of the municipality;*
- b. *Aligns the resources and capacity of the municipality with the implementation of the plan;*
- c. *Complies with the provisions of this Chapter; and*

- d. *Is compatible with national and provincial development Plans and planning requirements binding on the municipality in terms of legislation.*

In terms of the core components of integrated development Plans; Section 26 of the Municipal Systems Act 32 of 2000 (chapter 5 thereof) indicates 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 new approach in implementing a COVID- 19 IDP*
- i. *A financial plan, which must include a budget projection for at least the next three years; and*
- j. *The key performance indicators and performance targets determined in terms of section 41.*

1.2.2 Annual Budget

The Annual Budget and the IDP are inextricably linked to one another and accordingly it was formalized through the promulgation of the Municipal Finance Management Act 56 of 2003.

Section 21 (1) of the Municipal Finance Management Act (Chapter 4 thereof) indicates that: *The Mayor of a municipality must-*

- a. *At least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for-*
 - i. *The 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*
- iv. *The consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).*

1.2.3 Performance Management System

Chapter 6 of the Municipal Systems Act 32 of 2000 prescribes as follows on the development of performance management system:

A Municipality must—

(a) Establish a performance management system that is—

(i) Commensurate with its resources;

(ii) Best suited to its circumstances; and

(iii) In line with the priorities, objectives, indicators and targets contained in its integrated development plan;

(b) Promote a culture of performance management among its political structures. Political office bearers and councillors and in its administration;

1.2.3.1 The Service Delivery & Budget Implementation Plan (SDBIP)

The Service Delivery & Budget Implementation Plan (SDBIP) is an implementation plan of the approved Integrated Development Plan (IDP) and Medium Term Revenue Expenditure Framework. Section 1 of the Local Government Municipal Finance Management Act defines the SDBIP as: "a detailed plan approved by the Mayor of a municipality in terms of section 53 (1) (c) (ii) for implementing the municipality's delivery of services and the execution of its annual budget and which must include (as part of the top-layer) the following:

a) Projections for each month of –

i. Revenue to be collected, by source; and

ii. Operational and capital expenditure, by vote;

b) Service Delivery Targets and Performance indicators for each quarter

CHAPTER 2: PURPOSE AND ALIGNMENT OF THE PROCESS PLAN

2.1 Purpose of process plan

The Local Government Municipal Systems Act as promulgated in 2000 describes the various core processes that are essential to realizing a system of developmental local government. These aspects include participative governance, IDP, Performance Management and reporting, resource allocation and organizational change. These processes are linked into a single cycle at the local level that will align various sectoral initiatives from national and provincial government departments with Port St. Johns Municipal processes. Therefore, the purpose of this document is to outline the operational plan (an integrated Process) for the review of the Integrated Development Plan for Port St Johns Municipality. This process plan is based on the unique character and circumstances of Port St. Johns Municipality, taking due cognizance of the process plan requirements outlined in the Municipal Systems Act (Sec. 34) and guidelines for Integrated Development Planning.

2.2 Alignment of the IDP, Budget and Performance Management System

This process plan will ensure the alignment of the IDP, Budget preparation process, and the Performance Management System (PMS). The linkages of the three processes are summarized in the following diagrams:

Figure 1: The IDP, Budget and PMS Linkages

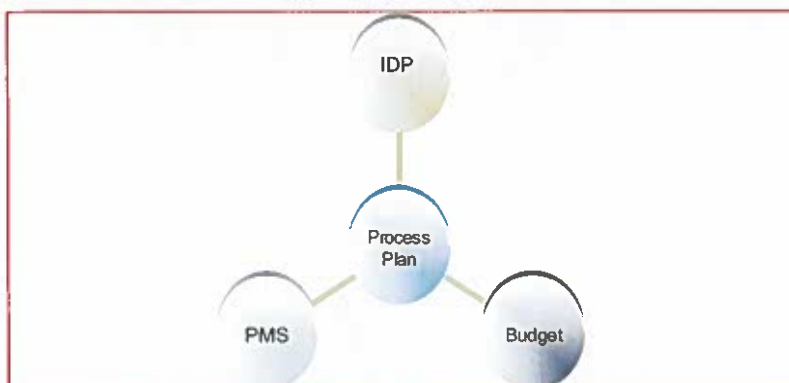
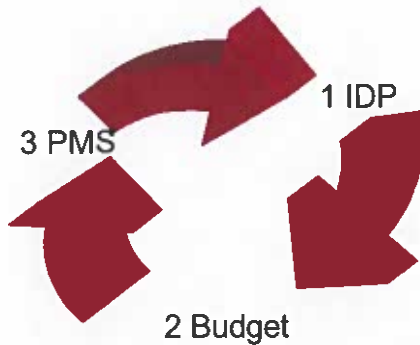


Figure 2: Relative Process Flow

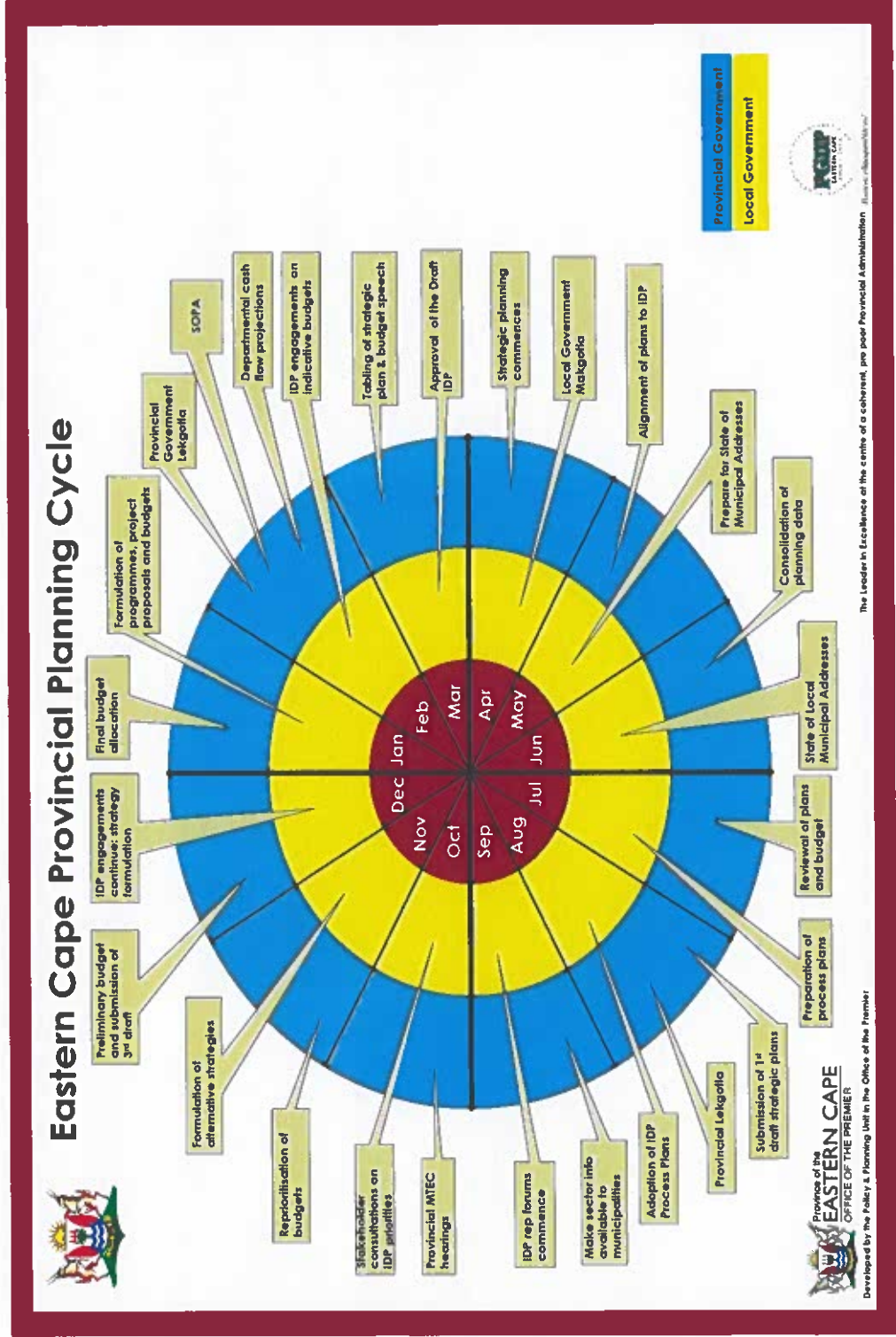


2.3 Eastern Cape Provincial Planning Cycle

It is important for a municipality to align its strategic objectives with national and provincial development policies, strategies and programmes. Chapter 5 of the Local Government Municipal Systems Act 32 of 2000, in particular, provides direction on co-operative governance, encouraging municipalities to develop their strategies in line with other organs of state so as to give effect to the five year strategic plans. It goes further to instruct that the IDP must link, integrate and co-ordinate development plans for the municipality.

Port St. John's Municipality recognises this obligation of ensuring a well-coordinated strategic relationship with other spheres of government and as such the municipality has aligned its IDP and Budget Processes to the Eastern Cape Provincial Planning Cycle illustrated below, wherein the blue circle represents the provincial government and the yellow circle represents the local government being the municipalities. This alignment is further expressed in Chapter 7 of this process plan, which details the timeframes and the activities that will be undertaken in carrying out the 2024/25 IDP review.

Figure 3: Eastern Cape Provincial Planning Cycle



2.4 Key Elements to be addressed in this Process

The following is a summary of the main activities to be undertaken during this IDP Process:

2.4.1 Assessment issues

- Comments received from the various role-players in the assessment of the IDP including MEC'S comments.
- Shortcomings and weaknesses identified through Self-assessment

2.4.2 Review of the Strategic elements of the IDP in terms of Council's new Priorities

- Review of the Objectives;
- Review of the Strategic elements of the IDP;
- Review of Spatial Development Framework and Land Use Management;
- Reviewing long term vision & mission;
- Focus on development projects of turning Port St. John's into a City

2.4.3 Inclusion of new information (where necessary)

- Addressing areas requiring additional attention in terms of legislative requirements not addressed during the previous years of the IDP development/ review process
- Alignment of the IDP with newly completed Sector Plans;
- Review of the Strategic elements of the IDP;
- A new approach during COVID 19 era or state of disaster
- The ongoing alignment of the Port St Johns Municipality's Performance Management System (PMS), as contained in Chapter 6 of the Local Government Municipal Systems Act 32 of 2000, with the IDP;
- The update of the Financial Plan, the list of projects (both internal and external funded), and the capital investment framework

2.4.4 Horizontal and Vertical Alignment Framework Plan

In terms of Section 26 of the Local Government Municipal Systems Act Chapter 5 thereof, Districts are required to prepare and adopt a Framework Plan which indicates how the District and Local Municipalities will align their IDP's. The Framework Plan provides the linkage and obligatory relationships to be established between the district and local municipalities in the region and in doing so, proper consultation, coordination and

alignment of the review process of the district municipality and various local municipalities can be maintained.

2.5 Mediums/ Methods of Communication

Involvement of the community and stakeholder organisations in the process is one of the main features about integrated development planning, Budget process and Performance Management. This ensures that the IDP addresses the real issues that are experienced by the citizens. Section 152(e) of the Constitution of the Republic of South Africa 108 of 1996 stipulates that one of the objectives of municipalities is "to encourage the involvement of communities and community organisations in the matters of local government". The 1998 White Paper on Local Government also put emphasis on public participation in decisions that affect the community. Through the Local Government Municipal Systems Act, 32 of 2000, participation in the decision making processes of the municipality is determined to be a right of communities, residents and ratepayers. The following mechanisms will be used for participation, to inform and communicate to stakeholders at any point in time during the process:

METHOD	REASON
Newspaper publication	To invite comments from the public for both draft and final IDP and Budget documents. To ensure the municipality adheres to legislation in terms of publishing the notices in the local newspapers. (Cost containment measures do not permit this method)
Loud hailing	To alert the community on the IDP processes as well as to ensure the message is carried out within the community to attend the public participation meetings.
Ward committee meetings	Ward committees serves as an official specialised participatory structure within the municipality and a mobilizing agent for community participation within the wards. Ensure constructive and harmonious interaction between the municipality and community through the use and co-ordination of ward residents meetings and other community development forums.
Website	To adhere to legislation in terms of section 21 of the Municipal Systems Act as well as to make the IDP and all other related documents public on the municipal website.

Roadshows through Physical /Zoom Meetings	A number of road shows will be conducted in an effort to ensure that the public is actively involved throughout the process. Announcements of the zoom meetings will have to be made.
Notices	Notices on the IDP Process (in English and isiXhosa) will be placed at strategic Notice boards: public buildings (e.g. Schools, Clinics, Tribal Authorities/Magistrates Courts etc.) and places of religion. Notices can also be attached on the municipal customers monthly accounts
Radio Interaction	The Municipality will also make use of its local radio to communicate its programmes. This will ensure that the communication reaches and allows a maximum number of stakeholders.

CHAPTER 3: THE IDP DEVELOPMENT APPROACH

The suggested approach for IDP development process according to the Department of Cooperative Governance & Traditional Affairs (COGTA) IDP Guide Pack II is as follows:

(i) Preparing for IDP development

Before the process commences, certain arrangements have to be made to ensure that the process will run smoothly. Such a process needs to be properly organised and prepared in a business plan form that includes the following:

- Assigning role and responsibilities;
- Organisational arrangements including confirmation of IDP Steering Committee and procedures, mechanisms for community and stakeholder participation;
- Design mechanism and procedures for alignment with external stakeholders such as other municipalities and other spheres of government;
- Designing a programme which sets out the envisaged planning activities, time frames and resource requirements for planning process;
- Once a process plan has been developed, it has to be adopted by the municipal council in terms of the Municipal Systems Act, 2000.

(ii) Monitoring (What is happening)

Monitoring in the context of IDP review refers to the gathering and subsequently organizing the data into sets of information about the certain sets of action/ events / situations throughout the year. There are three main bodies of information, which are important as input into a process:

- Implementation management information;
- Information about the achievement of objectives set in the IDP;
- New information gathered in the IDP review.

(iii) Evaluation (What does the information tell us)

The information gathered during the process of monitoring described above is assessed to understand its relevance and its implications to the priority issues, objectives, indicators and targets. Irrelevant and incorrect information should be discarded. The relevant information is analyzed and synthesized for its relevance to the IDP.

(iv) Council Adoption of the IDP

The IDP has to be adopted and approved by the Municipal Council in accordance with the legislated timeframes.

(v) Prepare and adopt Annual Budget

Municipal Systems Act 32 of 2000 and Municipal Finance Management Act 56 of 2003 require the municipal council budget to be informed by the IDP. This means the annual municipal budget should reflect the objectives, strategies, projects and programmes contained in the IDP.

(vi) Time - frame

The total period of time required for IDP review process will be nine months. As the IDP should significantly inform the budget, the timing of the IDP should be coordinated closely with the structuring of the annual budget process that starts in July of each year.

CHAPTER 4: ROLES AND RESPONSIBILITIES

The following positions and structures are recommended and will serve as a guide: -

ACTORS	ROLES AND RESPONSIBILITIES
Municipal Council	<ul style="list-style-type: none"> Political decision making body Consider, adopt and approve process plan, IDP and Budget Ensure the annual business plans, budget and use management decision are linked to and based on the IDP. Adjust in accordance with the comments of the MEC for Local Government.
Executive Committee	<ul style="list-style-type: none"> Recommend the Process Plan to Council Overall management, coordination and monitoring of process and drafting of IDP Approve nominated persons to be in charge of the different roles, activities and responsibilities Overall management and coordination of planning process Ensure the annual business plan, budget and land use management decision are linked to and based on the IDP
Speaker	<ul style="list-style-type: none"> Overall monitoring of the public participation process. Exercise oversight of the ward committee system.
Ward Councilors, Ward Committees and CDWs	<ul style="list-style-type: none"> Major link between municipality, government and residents Link the planning process to their wards or constituencies Organizing public consultation and participation Participation of the ward committees in the IDP Representative Forum
Municipal Manager	<ul style="list-style-type: none"> Managing and coordinate the entire IDP and budget process as assigned by the Mayor. Chair the IDP, Budget and PMS Technical Steering Committee Meetings. Fulfil the duties of Accounting Officer as set out in Sections 68 and 69 of the MFMA, Act 56 of 2003.
Chief Financial Officer	<ul style="list-style-type: none"> Convenes the finance sub-committee Responsible for the day to day management of the budgeting process Responsible for researching for grants/donations earmarked for the Port St. Johns Municipality to sensitize HODs to develop business plans Ensure that timeframes relating to the budgeting process are being met

Strategic Manager	<ul style="list-style-type: none"> • Prepare the Process Plan • Undertake the overall management and co-ordination of the planning process • Ensure that all relevant stakeholders are appropriately involved • Nominate persons in charge of different roles • Be responsible for the day-to-day management of the drafting process • Ensure that the planning process is participatory, strategic and implementation orientated and is aligned with and satisfies sector planning requirements • Respond to comments on the draft IDP from the public, horizontal alignment and other spheres of government to the satisfaction of the municipal council. • Ensure proper documentation of the results of the planning of the IDP document, and • Adjust the IDP in accordance with the MEC for local Government's proposals • Implement some Delegated functions by the Municipal Manager • May Delegate some functions to other IDP subordinates
Senior Managers Departments	<ul style="list-style-type: none"> • Provide relevant technical, sector and financial information for analysis for determining priority issues. • Provide technical expertise in consideration and finalisation of strategies and identification of projects. • Provide departmental, operational and capital budgetary information. • Preparation of project proposals, integration of projects and sector programmes.
Municipal and Government Officials	<ul style="list-style-type: none"> • Provide departmental operational and capital budgetary information • Be responsible for the preparation of project proposals, the integration of projects and sector programmes.

CHAPTER 5: INSTITUTIONAL ARRANGEMENTS FOR THE IDP

Structure	Members of the structure	Terms of Reference
<p>Political Steering Committee</p>	<p>Chair: Mayor</p> <p>Secretariat: Council Secretary</p> <p>Speaker</p> <p>Council Chief Whip</p> <p>Executive Committee</p> <p>The Municipal Manager</p> <p>The Chief Financial Officer</p> <p>Senior managers;</p> <p>Union representative</p> <p>Strategic Manager</p> <p>The manager responsible for budgeting & reporting;</p> <p>The manager responsible for planning; and</p> <p>Any technical experts on infrastructure.</p>	<p>In terms of Section 21 of the Municipal Finance Management Act requires that the Mayor of the Municipality co-ordinates the process 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.¹</p> <p>Regulation 4 of the Municipal Budget and Reporting Regulations requires that the Mayor of a Municipality must establish an IDP & Budget Steering Committee to provide technical assistance to the Mayor in discharging the responsibilities set out in Section 53 of the Municipal Finance Management Act.</p> <p>Delegated powers by Council</p> <p>The Council delegates that the Committee would assist the Mayor in executing his duties in terms of Section 53 of the Municipal Finance Management Act by considering the following:</p> <ul style="list-style-type: none"> (a) The tariffs for the budget year (b) Funding envelopes (c) Projected expenditures per identifiable project. (d) Adjustment budgets (e) Expenditure patterns (f) Grant performance

		<p>(g) The drafting of IDP & Budget Process Plan</p> <p>Challenges identified on implementation of the budget and recommended immediate interventions</p> <p>The IDP, Budget and PMS Political Steering Committee would be directly accountable to the Council and would present all IDP, budget and PMS related issues to Council directly.</p> <p>The Council delegates that the Management would be responsible for the technical support to the Committee.</p> <p>That the Mayor and the Municipal Manager would be responsible for the establishment of the Committees.</p> <p>The Municipal Manager would be responsible to sign the appointment letters of the members of the Committee.</p>
<p>Technical Steering Committee</p>	<p>Chair: Municipal Manager</p> <p>Secretariat: Secretaries to the Municipal Manager and the Chief Financial Officer</p> <p>Composition: Top Management and a Manager Responsible for IDP</p> <p>Adhoc representation: Executive Committee members</p>	<ul style="list-style-type: none"> • Provide Terms of Reference for the various planning activities • Commission research studies • Considers and comments on: <ul style="list-style-type: none"> - Inputs from sub-committees, study teams and service providers/advisors - Inputs from provincial sector departments and support providers - Processes, summaries and documents output • Makes content change recommendations • Prepares, facilitates and documents meetings

<p>Finance Sub-committee</p>	<p>Chair: Chief Financial Officer Secretariat: Secretary of the CFO Composition: Top Management Adhoc representation-Members of the Financial Services Standing Committee</p>	<ul style="list-style-type: none"> • Prepares an action plan linked to the IDP process plan for the development of the annual budget • Reviews the previous and current year budget and sets basis for the next budget • Ensures that the budget is aligned to the IDP • Reviews the revenues sources of the municipality and proposes options for financing of the budget • Responsible for allocating self-generated revenues to the municipal departments based on a predetermined formula. Provide guidance and advise on compliance with the Municipal Finance Management Act to the IDP & Budget Steering Committee (political) • Provide a report to the IDP & Budget Steering Committee (political) on the IDP and Budget processes when it is required by the committee
<p>IDP/Budget & PMS Representative Forum</p>	<p>Chair: Mayor Secretariat: IDP Officer Composition: Government representatives:</p> <ul style="list-style-type: none"> • Executive Committee • All Councillors • Ward Committees and CDWs • Top Management • Regional / District and Provincial Managers <p>Public representatives:</p> <ul style="list-style-type: none"> • Stakeholders 	<p>The IDP Representative Forum shall:</p> <ul style="list-style-type: none"> • Represent the interests of their constituents in the IDP processes • Provide an organizational mechanism for discussion, negotiation and decision making between the stakeholders including the municipal government • Ensure communication between all stakeholder representatives including the municipal government

	<ul style="list-style-type: none"> Representatives of organized groups Community Representatives 	<ul style="list-style-type: none"> Monitor the performance of the planning and implementation processes. Participate in the process of setting up and monitoring “key performance indicators” in line with the Performance Management Manual.
IGR and IGR Forums	<p>Political IGR Chair: Mayor Secretariat: Strategic Manager Composition:</p> <p>Representation</p> <ul style="list-style-type: none"> Executive Committee All Councillors Ward Committees and CDWs Top Management Regional / District and Provincial Managers <p>Technical IGR Chair: Municipal Manager Secretariat: IGR Officer Composition:</p> <p>Representation</p> <ul style="list-style-type: none"> Top Management Regional / District and Provincial Managers 	<p>The IGR Steering Committee shall:</p> <ul style="list-style-type: none"> Represent the interests of their constituents in the IDP processes Provide departmental mechanism for discussion, negotiation and decision making between the government and municipal Ensure communication between all government representatives including the municipal government Monitor the performance of the planning and implementation processes. Participate in the process of setting up and monitoring “key performance indicators” in line with the Performance Management Manual. Consolidate IGR Forum to present to the Political Steering Committee.

5.1 Steering Committees (Technical and Political)

The IDP/budget/PMS Steering Committee, form part of the IDP development process, and will continue to function throughout the IDP review process. Before the review process commences, it is important that certain institutional arrangements be put in place to ensure that the process is managed well. Port St Johns IDP Steering committee of the is divided into a technical & political Steering Committees. Technical committee is composed of senior Management, the strategic Manager and Budget & reporting

Manager. Political Steering Committee comprising of Mayor, Speaker, Chief Whip, Executive Committee Members, Municipal Manager, Senior Managers and Strategic Manager.

5.2 IDP, Budget and Performance Management System Representative Forum

The Representative Forum will be established through a process where all interested and affected stakeholders will be invited to participate in the IDP and Budget review process. The approach will ensure that all stakeholders within the municipality are fully represented in the Representative Forum. The Representative Forum must also have representatives from all Spheres of Government with emphasis on Provincial Government Departments and those sector departments located within the local Municipal Space and also government Parastatals such as Eskom, and Government Agencies such as ECPTA, SALGA etc.

The Representative Forum is reviewed on an annual basis to ensure that it is continuously effective to ensure sustainable planning and service delivery within the municipality. It is therefore recommended that advertisements be placed in the local newspapers, on the notice boards, or in the local community radio to inform community members of the IDP Preparation and further invitation of interested parties to form part of the Representative Forum to ensure a wider representation and the need for continued participation in the IDP process through the Representative Forum. This will ensure that the final IDP is reflective and inclusive of all needs and programmes of all parties.

5.3 IDP Project Task Teams

The Project, Programme and Sectoral task teams will be small operational teams composed of a number of relevant municipal sector departments and technical officials involved in the management of the implementation and where appropriate, community stakeholders directly affected by the project and programme.

CHAPTER 6: DISTRIBUTION OF ROLES AND RESPONSIBILITIES BETWEEN THE MUNICIPALITY AND EXTERNAL ROLE PLAYERS

It is one of the pre-requisitions of a smooth and well organised IDP process that all role players are fully aware of their own and of other role players' responsibilities. Therefore, it is one of the first preparation requirements for the IDP process to ensure that there is a clear understanding of all required roles and of the persons or organisations that can assume those roles.

This chapter deals with:

- The role which the municipality has to play in the IDP process in relation to the roles which external role players are expected to play.
- The further specification of roles within the Municipality and the responsibilities related to that role in detail.

ROLE PLAYERS	ROLES AND RESPONSIBILITY
Port St. Johns Municipality	<ul style="list-style-type: none"> • Prepare and adopt the IDP. • Undertake the overall planning, management and coordination of the IDP process. • Consider comments of the MEC on the IDP and adjust the IDP if necessary. • Ensure linkage between the Budget and IDP.
Local residents, communities and stakeholders	<ul style="list-style-type: none"> • Represents interest and contributes knowledge and ideas in the IDP process by participating in and through the ward committees and rep forums • Keep constituencies informed on IDP activities and outcomes. • Inform and/or update interests groups, communities and organizations. • Analyze issues, determine priorities, negotiate and reach consensus • Participate in designing project proposals • Discuss and comment on the draft IDP & monitor performance in implementation • Conduct meetings with groups, communities etc. to prepare for the follow-up on relevant planning activities
O. R. Tambo District Municipality	<ul style="list-style-type: none"> • Ensure alignment of the IDP between the municipality and the district municipality (Integrated District and Local Planning). • Preparation of joint strategy workshops between municipality, provincial and national government.

Provincial government	<ul style="list-style-type: none"> • Ensure horizontal alignment of the IDP between the municipality and the District municipality. • Ensuring vertical and sector alignment between provincial sector • Departments/ provincial strategic plans and the IDP process at local/district level. • Efficient financial management of Provincial IDP grants. • Monitor the IDP progress & assist municipalities in compiling the IDP. • Coordinate and manage the MEC"s assessment of the IDP. • Provincial Treasury must provide views and comments on the draft budget and any budget-related policies and documentation for consideration by council when tabling the budget. • Conduct (MTREF) budget and IDP assessment.
Sector departments	<ul style="list-style-type: none"> • Contribute sector expertise and knowledge. • Provide sector plans and programmes for inclusion in the IDP. • Provide information to IGR Technical Steering Committee and IGR Forums
National government	<ul style="list-style-type: none"> • National Treasury issues guidelines on the manner in which municipal councils should process their annual budgets, including guidelines on the formation of a committee of the council to consider the budget (Section 23(3) of the MFMA).

CHAPTER 7: TIMEFRAMES

PHASES	TARGET/ ACTIVITY	ROLE PLAYERS	TIME FRAMES	MECHANISM S/ TOOLS	OUTPUT
Preparation Phase	Development of IDP, Budget & PMS Process Plan.	Strategic Manager and Chief Financial Officer	29 June 2023	Desktop Work	Approved IDP and Budget & PMS Process Plan.
	Risk Committee Meeting for review and assessment	Municipal Manager & RMC members	17 July 2023	Meeting	Annual Financial statements, APR & Draft Annual report
	Tabling of the draft IDP/Budget & PMS Process plan, to Standing committees (BTO & Corporate Services and Research, Planning & IGR)	Councillors & Management	19 July 2023	Meeting	
	Presenting of draft IDP, Budget & PMS Process Plan, to Executive Committee	Portfolio Head Corporate services and Research, Planning & IGR Portfolio head Budget & Treasury Office	26 July 2023	Meeting	
	Presentation of draft IDP, Budget & PMS Process Plan, to Council	Mayor & Council	28 July 2023	Meeting	

	IDP/ Budget & PMS Rep Forum to table the adopted IDP, Budget & PMS Process Plan.	Municipal Manager	11 August 2023	Meeting	
	Presentation of draft Annual Financial Statements, Annual performance report & draft annual report to Audit, Risk & Performance Committee	Audit, Risk & Performance Committee	16 August 2023	Meeting	
	Presentation of draft Annual Financial Statements, Annual performance report & draft annual report to Corporate Services, IGR, Planning & IGR and BTO Standing committees	Councillors & Management	22 August 2023	Meeting	
	Presentation of draft Annual Financial Statements, Annual performance report & draft annual report to Executive Committee	Portfolio heads (Corporate Services, Research, Planning & IGR and BTO)	24 August 2023	Meeting	
	Presentation of draft Annual Financial Statements, Annual performance report & draft annual report to Council	Mayor & Council	29 August 2023	Meeting	
	Submission of Annual Financial Statements, Annual Performance Report & Draft Annual Report to Auditor General	Municipal Manager	31 August 2023	Consultation	

	<ul style="list-style-type: none"> Send hard copy to COGTA, Treasury & other relevant stakeholders Load to the website and newspaper Invite stakeholders to update database for year 2023/24 	Strategic Manager	01 September 2023	Consultation	
	IDP/Budget & PMS Roadshows	Mayor	18-21 September 2023	Consultation	
	Submission of Consolidated Annual Financial Statements to AG & Treasury	Management	30 September 2023	Meeting	
Analysis Stage	2023/24 Annual performance reviews for senior managers & Municipal Manager	Mayor, portfolio heads & Municipal Manager	06-07 October 2023	Meeting	Situational analysis & Section 72 reports
	Submit Quarter 1 reports to Internal Audit for review	Strategic Manager	09 October 2023	Consultation	
	Risk Management Committee Meeting for quarterly review	Municipal Manager	10 October 2023	Meeting	
	Ordinary Audit, Risk & Performance Committee Meeting for quarter 1 reviews	Municipal Manager	23 October 2023	Meeting	

	Submission of preliminary Projects with their business plans	Municipal Manager	18 October 2023	Meeting
	Ordinary Council Meeting	Mayor	30 October 2023	Meeting
	IDP/Budget & PMS Technical Steering Committee for Situational Analysis	Municipal Manager	01 November 2023	Meeting
	Political Steering Committee for Situational Analysis	Mayor	03 November 2023	Meeting
	IGR Forum for Situational Analysis	Municipal Manger	07 November 2023	Meeting
	IDP, Budget & PMS Representative Forum to present situational analysis and community priority needs	Mayor	14 November 2023	Meeting
	Submission of IDP Situational Analysis to Standing committee (Corporate Services, Research & IGR)	Management & Councillors	21 November 2023	Meeting
	Submission of IDP Situational Analysis to EXCO	Management & Councillors	24 November 2023	Meeting
	Submission of IDP Situational Analysis to Council	Mayor	29 November 2023	Meeting
	Risk Management Committee Meeting for risk management review	Municipal Manager	09 January 2024	Meeting
	Submission of Mid-year Performance assessment Report (MFMA sec72)	Management	15 January 2024	Meeting

	2023/2024 (Section 72) to Audit, Risk & Performance Committee				
	Submission of Mid-year Performance assessment Report (MFMA sec72)	Municipal Manager	18 January 2024	Meeting	
	2023/2024 (Section 72) to Standing committees (Corporate services, Research, Planning & IGR)				
	Submission of Mid-year Performance assessment report (MFMA sec72)	Municipal Manager	22 January 2024	Desktop exercise	
	2023/2024 (Section 72) to Mayor				
	Submission of Mid-year Performance assessment report (MFMA sec72)	Municipal Manager	25 January 2024	Desktop exercise	
	2023/2024 (Section 72) to EXCO				
	Tabling of the Annual Report, MFMA section 52(D) & 72 Reports to Council	Mayor	30 January 2024	Meeting	
	Management Retreat session	Management	01-02 February 2024	Meeting	
Strategies Phase	Mid-Year performance and MTREF Budget engagement	Treasury	06 February 2024	Meeting	
	Technical Budget Steering committee	Municipal Manager	07 February 2024	Meeting	
	Political steering Committee	Mayor	09 February 2024	Meeting	

Projects & Integration Phase	EXCO retreat session in preparation for strategic planning	EXCO members	12-14 February 2024	Meeting
IGR forum for Strategic Planning	Municipal Manager	20 February 2024	Meeting	
Presentation of Adjustment Budget & adjustment SDBIP to EXCO	Mayor	21 February 2024	Meeting	
Strategic Planning Session	Mayor	26 February -29 February 2024	Meeting	
Tabling of the adjustment Budget and SDBIP to Council	Mayor	26 February 2024	Meeting	
IDP, Budget & PMS Technical steering Committee presenting draft IDP, draft Budget, draft SDBIP and Annual Report	Municipal Manager	06 March 2024	Meeting	
IDP, Budget & PMS Political Steering Committee presenting draft IDP, draft Budget, draft SDBIP & Annual Report	Mayor	07 March 2024	Meeting	
IDP, Budget & PMS Representative Forum to present the submitted draft internal and external projects and also set and agree on IDP priority programmes or projects	Mayor	13 March 2024	Meeting	
Tabling of the Draft IDP, draft Budget & draft SDBIP to Standing	Municipal Manager	14 March 2024	Meeting	

	committees (BTO and Corporate Services, Research, Planning & IGR)				
	Tabling of the Draft IDP, draft Budget & draft SDBIP to Executive Committee	Municipal Manager	19 March 2024	Meeting	
	Tabling of Draft IDP, draft Budget , draft SDBIP, Annual Report & Oversight report on Annual report to Council	Mayor	26 March 2024	Meeting	
	Upload the Draft IDP and Budget on the Website	Strategic Manager	27 March 2024	Desktop work	
	Submission of Draft IDP and Budget to COGTA and Treasury	Strategic Manager	27 March 2024	Desktop work	
Approval Phase	Issue a notice on the adoption of the draft IDP and Budget and Invite public comments	Strategic Manager	28 March 2024	Desktop exercise	5- year financial plan 5 -year capital investment programme
	Prepare for IGR Meeting to present the reviewed final projects that would responding to the situational analysis as well as resolutions	Strategic Manager and Chief Financial Officer	28 March 2024	Meeting	

	taken during the Strategic Planning Session				Integrated Spatial Development Framework Integrated sectoral programmes (LED, HIV, poverty alleviation, gender equity etc.) Consolidated monitoring/performance management system Disaster management plan Institutional plan
	IDP, Budget & PMS Technical Steering Committee to prepare for the IDP and Budget Roadshows	Municipal Manager	4 April 2024	Meeting	
	IDP, Budget & PMS Political Steering Committee to confirm and approve the IDP and Budget Roadshows schedule	Mayor	09 April 2024	Meeting	
	IGR forum in preparation for IDP roadshows	Mayor	11 April 2024	Meeting	
	Audit, Risk & Performance Committee for quarter 3 reviews	Municipal Manager	15 April 2024	Meeting	
	Presentation of quarter 3 and preparations for IDP, Budget & PMS Roadshows schedule Standing committee (Corporate Services, Research & IGR)	Municipal Manager	17 April 2024	Meeting	
	Presentation of quarter 3 and preparations for IDP, Budget &	Municipal Manager	24 April 2024	Meeting	

Approval Phase	PMS Roadshows schedule to EXCO	Strategic Manager and CFO Municipal Manager Municipal Manager	22, 23, 25 & 26 April 2024 29 April 2024 30 April 2024	Consultation Meeting Meeting	Reference to sector plans
Approval Phase	IDP, Budget & PMS roadshows.	Strategic Manager and CFO	22, 23, 25 & 26 April 2024	Consultation	
	Presentation of quarter 3 confirmation of IDP, Budget & PMS Roadshows schedule to Council	Municipal Manager	29 April 2024	Meeting	
	IDP, Budget & PMS Technical Steering Committee to prepare refines IDP and Budget Roadshows outcomes	Municipal Manager	30 April 2024	Meeting	
	IDP, Budget & PMS Political Steering Committee for presentation of draft IDP, Budget & PMS 2023/24	Mayor	07 May 2024	Meeting	
	IDP, Budget & PMS Representative Forum to present the draft IDP & Budget	Management	09 May 2024	Meeting	
	Submission of final IDP and Budget to Standing committees	Municipal Manager	14 & 15 May 2024	Meeting	

(Corporate Services, Research, Planning & IGR and BTO)				Approved IDP, Budget and SDBIP
Submission of final IDP and Budget to Executive Committee	Municipal Manager	21 May 2024	Meeting	
Submission of final IDP and Budget to Council	Mayor	28 May 2024	Meeting	
Submission of final IDP and Budget to MEC, Treasury and Local Government.	Strategic Manager	30 May 2024	Electronic & Hand delivery	
Publication of approved IDP and Budget on website and local newspaper	Strategic Manager	04 June 2024	Meeting	
Finalization and submission of draft 2024/25 SDBIP, departmental SDBIPs and Risk review assessment	Strategic Manager	04-07 June 2024	Meeting	
Submission of 2024/25 SDBIP and annual performance agreement to the Mayor	Municipal Manager	12 June 2024	Meeting	
Risk Committee Meeting for review and assessment	Municipal Manager	18 June 2024	Meeting	

	Submission of 2024/25 SDBIP to the Standing committee (Corporate Services, Research, Planning & IGR)	Municipal Manager	20 June 2024	Meeting	
	Submission of 2024/25 SDBIP to the EXCO	Municipal Manager	25 June 2024	Meeting	
	Submission of 2024/25 SDBIP to the Council	Municipal Manager	27 June 2024	Meeting	
	Approval of the 2024/25 SDBIP and Performance agreements of the Municipal Manager and Senior Managers	Mayor and Municipal Manager	27 June 2024	Meeting	
	Submit the approved SDBIP and performance agreements to MEC COGTA and Treasury	Mayor	01 July 2024	Electronic & Hand Delivery	

CHAPTER 8: PARTICIPATION AND STAKEHOLDER ENGAGEMENT

8.1 Participation mechanisms for different phases

Below are the phases of the IDP review process and the participation mechanisms that will be used for the different phases: -

PLANNING PHASE	PARTICIPATION MECHANISM
Analysis	<ul style="list-style-type: none"> • Community meetings • Stakeholder meetings • IDP Representative Forum
Strategies	<ul style="list-style-type: none"> • Meeting involving government departments and stakeholder representatives • Input into IDP Representative forums at a local level
Projects	<ul style="list-style-type: none"> • Community meetings • Stakeholder meetings • IGR Forums • IDP Representative Forum
Integration	<ul style="list-style-type: none"> • IDP Representative Forum
Approval	<ul style="list-style-type: none"> • Broad public discussion, consultation process • Community meetings • Stakeholder meetings • Opportunity for comments from residents and stakeholder organisation
Monitoring of implementation	<ul style="list-style-type: none"> • Community meetings • Stakeholder meetings • Outreach Programs

8.2 Appropriate language usage

English will be used as the medium of communication. However, in community meetings where most people speak Xhosa, their language will be used for presenting and elaborating on issues they raise.

8.3 Appropriate venues, Transport and Refreshments

Steering committee meetings will be held in Port St John's. Representative forum meetings will be held at appropriate venues, preferably the Municipal Town Hall. Roadshows will be held in wards in all wards. Refreshments will be provided at the discretion of the Municipal Manager.

CHAPTER 9: RESOURCES AND BUDGET

The IDP is the principal strategic document that informs all operations of the municipality. Therefore, in order to ensure that the document is reflective of the needs of the Port St. Johns community it is important that on an annual basis the municipality makes provision in their budget for the development and/or review of the municipality's IDP in accordance with the process plan. The municipality has made the following provision.

FUND	SOURCE	AMOUNT
IDP Review process	Equitable share	R922 220.00
Strategic Plan session	Equitable share	R1, 562, 802.00
Performance Management System	Equitable share	R557 833.00
Total		R3 042 855.00

Available resources are properly allocated to ensure that there is smooth implementation of the process plan. It must be noted that the delegation to the Strategic Planning Session will be in line with the Cost Containment measures. Administration delegation should not be more than Council members.

CHAPTER 10: CONCLUSION AND RECOMMENDATION

It is in our endeavor as a municipality to continuously improve on the alignment of our processes both internally and externally as envisaged by South Africa's legislative framework. Port St Johns Municipality promotes public participation and Intergovernmental Relations in sourcing of information.

The focus of the IDP formulation and budget process as detailed above is to improve on the implementation aspect, financial sustainability and clear linkage between the two processes, resulting in an increased and better service delivery to all the communities of Port St. Johns Local Municipality. IDP, budget and PMS Process Plan will be aligned to O. R. Tambo District Municipality Framework Plan and relevant legislative requirements. The Process Plan will be submitted to Council for approval and to the MEC for Local Government in accordance with section 32 of the Local Government Municipal Systems Act 32 of 2000.

RECOMMENDATIONS

- a) It is recommended that the Council approves the 2024/25 IDP, Budget & PMS Process Plan.

SIGN OFF

This 2024/25 IDP, Budget & PMS Process Plan is signed at Port St. Johns

Prepared by



M. Fihlani
Municipal Manager

31/07/2023

Date

Endorsed



Cllr. N. Mlombile-Cingo
Hon. Mayor

31/07/2023

Date