



# **Prince Albert Municipality 2017/18 IDP, SDF & Budget Time-Schedule of Events for the Approval of the 2018/19 IDP, SDF and Budget Adoption**

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The purpose of the time schedule is to indicate the various planned activities and strategies on which the municipality will embark to compose its integrated development plan for the adoption of the Integrated Development Plan (IDP) and the Spatial Development Framework (SDF) for implementation 2018/19 and Annual Budget for the 2018/19 financial year and the two outer years. The time schedule enhances integration and alignment between the IDP and Budget, thereby ensuring the development of an IDP based budget. It fulfils the role of a business plan or an operational framework for the IDP and SDF process outlining the manner in which the IDP, SDF and budget compilation process will be undertaken. In addition, it identifies the activities in the processes around the key statutory annual operational processes of the budget, SDF and IDP compilation, performance management implementation and the adoption of the municipality's annual report.

The IDP, SDF and Budget processes are distinct but integrally linked processes which must be coordinated to ensure that the IDP, SDF and budget related policies and the final budget are mutually consistent and credible. Credibility refers to the municipality's ability and capacity to spend and deliver services in accordance with its approved budget. The process creates its own dynamics since it encompasses the involvement of external role-players and vested interest groups therefore it requires accurate logistical planning and arrangements of engagement sessions to ensure that the process is implemented in accordance with the approved

schedule. However, experience has taught us that deviation from the approved time schedule may occur due to unforeseen events and circumstances which are beyond the control of the politicians and the administration. This would require adjustment to the timeframes to ensure that the execution of the process remains practical and that all legislative requirements are adhered to.

### Preparation Phase

IDP & Budget Activity	PMS Activity	Timeframe	Responsible
IDP Forum: Draft Framework & Process Plan		August 2017	IDP Coordinator
Prepare & Finalize Draft 2018/19 IDP and Budget schedule outlining the steps for compilation of the 2018/19 IDP Adoption and 2018/19 and two outer year's Budget		Augustus 2017	IDP Coordinator
Inform MEC on option to be followed on SDF review and amendment		30 August 2017	Manager: Corporate and Community Services
IDP & Budget Steering Committee Meeting: Establish Internal Partnerships & Institutional Arrangements		30 August 2017	Municipal Manager
Table Draft 2017/18 IDP/Budget Time Schedule to Management for quality check to ensure inclusiveness.		23 August 2017	IDP Coordinator
Confirm Steering Committee for SDF review and amendments		30 August 2017	Manager: Corporate and Community Services
Compile a SDF Checklist for legal compliance		30 August 2017	Manager: Corporate and Community Services

	Tabling of Draft 2018/19 IDP/Budget Process Plan to Council for approval with time schedules for IDP Public participation meetings.		30 August 2017	Manager: Corporate and Community Services/ MM & HOD'S
	Advertising IDP & Budget Process Plan		31 August 2017	IDP Coordinator

## 1. Analysis Phase

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
	Consider MEC comments and recommendations on assessment of 2017 - 2022 IDP Document and IDP processes followed.		30 August 2017, depends on receipt of MEC Letter	Municipal Manager & Manager: Corporate and Community Services
	Attend District IDP Forum Meeting-Discuss outcomes of IDP Assessments, Challenges and District Interventions i.t.o IDP planning for the review process.		18 August 2017	District IDP Coordinator
	Compile desk top profile of programs and activities of Municipal Area		25 August – 30 September 2017	Manager: Corporate and Community Services
	Strategic Planning Meeting of Council		First week in September	Manager: Corporate and Community Services and Speaker
	First Steering Committee Meeting of SDF amendments		7 September 2017	Manager: Corporate and Community Services
	Involve sector departments through discussions on relevant sector plans/ policies		8 September to 29 September 2017	IDP Coordinator

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
	Outline the spatial directives emanating from the national, provincial and municipal spatial policy		29 September 2017	Manager: Corporate and Community Services
	Develop a draft spatial vision for the municipal area		29 September 2017	Manager: Corporate and Community Services
1.5	Convene Internal IDP Meeting. (Dry Run) Final Discussion of Public Participation Meeting Processes.	<ul style="list-style-type: none"> <li>• Submit Quarterly Project Implementation Report</li> <li>• Quarterly Audit Committee Meeting</li> <li>• Audit &amp; Performance Audit Committee meeting</li> </ul>	12 September 2017/ September 2017	Manager: Corporate and Community Services
	<b>IDP Joint Planning Initiative</b> <ul style="list-style-type: none"> <li>▪ Identify projects and programs that might need support</li> <li>▪ Financial assistance FROM Government Department.</li> <li>▪ Referring issues from communities which have been identified during IDP processes but are not competencies of Local Government to the relevant National and Provincial sector Departments.</li> </ul>		TBC	Manager: Corporate and Community Services District IDP Forum
	Review the IDP and Sector Plans in terms of strategic focus and the key challenges for guiding the SDF		2-13 October 2017	Manager: Corporate and Community Services & IDP Coordinator
	Strategic analysis of the socio-economic situation of the municipality in terms of legacy, current and future challenges		16-30 October 2017	Manager: Corporate and Community Services & IDP Coordinator
	Review Ward Profile and Ward Based Plans for each ward		1-20 October 2017	IDP Coordinator
	Ward meetings to identify ward delivery needs		20 – 30 October 2017	IDP Coordinator
	Prepare draft status quo report on SDF		1-8 November 2017	Manager: Corporate and Community

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
	Table draft SDF to Council		November 2017	Services Manager: Corporate and Community Services
	Public participation on draft SDF		November 2017 to February 2017	Manager: Corporate and Community Services
	Ward committee meetings: prioritize ward needs		1 – 8 November 2017	IDP Coordinator
	IDP Representative Forum		11 November 2017	IDP Coordinator

## 2. Strategies Phase

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
2.1	Strategic Planning Session for Council		First week in September 2017	Council & Management
2.2	Ward Committees: profile and prioritize needs Discuss, scrutinize and priorities community needs		25 August to 15 November 2017	Manager: Corporate and Community Services  Ward Committee  Councilors
2.3	Compile strategic elements of IDP in light of the new focus of Council. Municipal Strategies, objectives, KPA's, KPI's and targets. - Identification of priority IDP KPI's incorporate in IDP and link to budget and IMAP		30 September 2017 to 30 October 2017	Manager: Corporate and Community Services & IDP Coordinator

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
2.4	Convene IDP Representative Forum: Presenting Service Delivery needs and Priorities per ward, Municipal Financial Position and Short-term Strategic Agenda.		15 November 2017	IDP Representative Forum

### 3. Project Phase

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
3.1	Attend District Manager: Corporate and Community Services Forum Meeting-Discuss outcomes of IDP Assessments, Challenges and District Interventions i.t.o IDP planning for the review process.		End of each month	IDP Coordinator
3.2	Managers finalize and prioritize Department's capital projects for 2018/19 Budget year and the next two outer years		02 - 13 February 2018	Municipal Manager Managers CFO
3.3	Operational Budget: Income / Expenditure inputs and statistics to be returned to Budget Office		03 -13 October 2017	Senior Management
3.4	Capital Budget: Departments to submit proposed 3 year Capital Budget per Department to Budget Office to consolidate inputs and compile a Draft Capital Budget.		15-30 November 2017	Senior Management
3.5	Convene IDP Representative Forum: Presenting Service Delivery needs and Priorities per ward, Municipal Financial Position and Strategic Objectives.		6 December 2017	IDP Coordinator PPO
3.6	Finalise Salary Budget for 2018/19		12 December 2017	CFO
3.7	Finalise preliminary projections on operating budget for 2018/2019	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report</li> <li>Quarterly Performance Audit Committee meeting</li> </ul>	12 December 2017	CFO
3.8	Finalise expenditure on operational budget for the budget year and two outer years.	<ul style="list-style-type: none"> <li>Mayor tables annual Report</li> <li>Advertise Annual Report and invite community inputs</li> </ul>	10 January 2018	CFO Manager: Corporate &

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
		<ul style="list-style-type: none"> <li>Section 57 Managers Quarterly Assessments</li> </ul>		Community Services
3.9	Departments to conclude Sector Plans and identify projects linked to sector plan implementation for submission to IDP unit for 2018/19 IDP Adoption.		31 December 2017	HOD's IDP Coordinator
3.10	Alignment of Sector Department projects & Programmes		29 – 30 January 2018	IDP Representative Forum

#### 4. Integration Phase

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
4.1	Final review of Municipal Strategic Objectives, KPA's, KPI's and Targets		28 - 30 January 2018	Manager: Corporate and Community Services & IDP Coordinator
4.2	Review all budget related policies			CFO
4.3	Adjustment Budget: Finalise Capital and Operational budget projections for 2018/19		February 2018	CFO
	B-municipalities to comment on the District wide draft IDP Review and Budget		February 2018	Manager: Corporate and Community Services
	Consider input on draft SDF		28 Feb-15 March 2018	Manager: Corporate and Community Services
4.4	IDP Representative Forum to conclude stakeholder investment i.t.o community development programmes and projects funded for inclusion in IDP and Budget.		February 2018	IDP Coordinator
4.5	Ward Committee Meetings: Discuss and brief Ward Committees about Council's revised strategic plan, Strategic Objectives and envisaged deliverables.	<ul style="list-style-type: none"> <li>Council to Consider and adopt an oversight report</li> <li>Set performance objectives for</li> </ul>	TBC	Manager: Corporate and Community

No.	IDP & Budget Activity	PMS Activity	Timeframe	Responsible
		revenue for each vote		Services IDP Coordinator PPO Office of the Speaker
4.6	Review final tariffs and charges and determines tariffs to balance the budget and finalise income budget.		13 February 2018	CFO
4.7	Attend District IDP Forum Meeting to discuss the alignment of IDP Strategic Development Goals		27 February 2018	District IDP Coordinator
4.8	Attend Provincial IDP INDABA 2. Incorporate Sector Departments Projects in Draft IDP.		TBC	Manager: Corporate and Community Services IDP Coordinator
4.9	Tabling of 2017/18 Adjustment Budget Rollovers; possible changes on SDBIP and KPI'S as per Adjustment Budget.	Amend IDP, SDBIP, KPI's and performance agreements i.t.o adjustment budget	23 - 25 January 2018	Mayor/ CFO
4.10	Municipalities receive inputs from National and Provincial Government and other bodies on factors influencing the budget, e.g. Grant Allocations	<ul style="list-style-type: none"> <li>Quarterly Project Implementation report</li> <li>Quarterly Audit Committee Meeting</li> <li>Submit Annual Report to Auditor General, Prov. Treasury and DLG</li> </ul>	28 February 2018	CFO Municipal Manager
4.11	Submit first draft IDP to CKDM for Horizontal Project alignment between the CKDM and Prince Albert		24 February 2018	IDP Coordinator
4.12	Forward Adjustment Budget to National and Provincial Treasury after approval			Executive Mayor & MM
4.13	Publication of approved Adjustment Budget after approval	<ul style="list-style-type: none"> <li>Council to Consider and adopt an oversight report</li> <li>Set performance objectives for revenue for each vote</li> </ul>	30 January 2018	Executive Mayor & MM

## 5. Approval Phase

No.	IDP & Budget Activity	PMS Activity	TIMEFRAME	RESPONSIBLE
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No.	IDP & Budget Activity	PMS Activity	TIMEFRAME	RESPONSIBLE
5.1	Submit Draft IDP to Municipal Manager with proposed schedule of Ward Committee Meetings for post IDP,SDF & Budget Feedback & Consultation Process		27 February 2018	IDP Coordinator
5.2	Workshop draft IDP , SDF & Budget and proposed tariffs with Council.	Audit of performance Measures Set municipal strategies, objectives, KPA's, KPI's and targets	06 March 2018	Municipal Manager CFO Manager: Corporate and Community Services
5.3	Municipal Manager presents final draft IDP, SDF, Budget and Budget related policies to the Mayor for perusal and tabling to Council		20 March 2018	Municipal Manager
5.4	Submit draft SDF, IDP, Budget, Related policies and proposed schedule of Ward Committee Meetings for IDP & Budget Feedback/Consultation Process to Council (Principal Approval)		27 – 31 March 2018	Municipal Manager CFO Manager: Corporate and Community Services
5.5	Forward Copy of preliminary approved Budget, IDP, SDBIP & related documents to National & Provincial Treasury and Department of Local Government– 90 days before start of new financial year.	Refinement of municipal strategies, objectives, KPA's, KPI's & targets for inclusion into IDP;  Section 57 Appointees' Quarterly Performance assessments	31 March 2018	Mayor & MM
5.6	Attend District IDP Forum- Present Draft IDP, SDF for input.		TBC	District Manager: IDP Coordinator
5.7	Advertise & Inviting public comments on Draft Budget and IDP Place copies of Draft Budget, IDP and SDF at all municipal buildings.		1 – 24 April 2018	CFO IDP Coordinator
5.8	Ward Committee Meetings: Feedback / Consultation on preliminary approved IDP, SDF & Budget		TBC	Office of the Speaker IDP Coordinator

No.	IDP & Budget Activity	PMS Activity	TIMEFRAME	RESPONSIBLE
5.9	CFO and Manager: Corporate and Community Services analyze public and Ward Committee comments and inputs on Draft IDP, draft SDF and Budget and prepare recommendations for Council's perusal		27 March– 01 April 2018	PP Officer CFO & Manager: Corporate and Community Services IDP Coordinator
5.10	Council considers public and Government Department's comments and inputs and revise SDF, IDP & Budget if necessary.		22– 26 May 2018	Mayor & MM
5.11	Table final IDP, SDF, budget & related documents to Council for approval.	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report</li> <li>Quarterly Audit Committee Meeting</li> <li>Annual review of organisational KPI's</li> <li>Review annual organisational performance targets</li> </ul>	29-31 May 2018	Mayor Municipal Manager CFO
5.12	Inform local community about approved IDP, SDF and Budget Detail: Place Newspaper Article and Copies at Libraries		5-9 June 2018	CFO Municipal Manager PP Officer IDP Coordinator
5.13	Send copy of approved Budget, IDP, SDF & related documents to National and Provincial Governments and other stakeholders			
5.14	Publication of Approved Budget and IDP within 10 workings days on Municipal Website		12 June 2018	CFO (Budget Office) Municipal Manager and Directors/Managers.
5.15	Submit draft SDBIP (Top Level) to Mayor within 14 days after approval of budget		19 June 2018	Municipal Manager
5.16	Mayor approves the municipality's SDBIP (Top Level) within 28 days after the approval of the budget		26 June 2018	Mayor
5.17	Place IDP, budget and SDF and related documents on CD for all Councilors		26 June 2018	Manager: Corporate

No.	IDP & Budget Activity	PMS Activity	TIMEFRAME	RESPONSIBLE
				and Community Services

**PROPOSED DATES FOR IDP PUBLIC ENGAGEMENTS: 2018/19 IDP REVIEW AND BUDGET CYCLE**

Dates/ 2018/19	Day	Time	Ward	Venue	Ward Councillor	Facilitator	Admin Support	Management
05 Feb 2018	Monday	18H00	1	Community Hall	Clr E Maans	A Vorster	H Esterhuizen	All
06 Feb 2018	Tuesday	18H00	4	NG Church Hall	Clr M Jaftha	A Vorster	H Esterhuizen	All
07 Feb 2018	Wednesday	18H00	3	Sydwell Williams Centre	Clr G Lottering	A Vorster	H Esterhuizen	All
08 Feb 2018	Thursdays	18H00	2	PPK Hall Community Hall Klaarstroom	Clr L Jacquet	A Vorster	H Esterhuizen	All