

DEPARTMENT: PLANNING AND DEVELOPMENT

**IDP 2022-2027, MSDF
AND BUDGET PROCESS
PLAN**

Table of Contents

1.1	Introduction and background	2
1.2	Legal Planning Context.....	2
1.3	The IDP Process	4
1.4	Contents of George Municipal IDP	4
1.5	Budget Preparation Process	5
1.6	The MSDF Process	7
1.7	Alignment between IDP, MSDF and Budget and Performance Management System (PMS) 8	
1.8	Horizontal and vertical alignment.....	9
1.9	Organisational arrangements	10
1.9.1	IDP and Budget Representative Forum	10
1.9.2	IDP and Budget Steering Committee	11
1.9.3	Ward Committees	11
1.9.4	MSDF Project Committee.....	12
1.9.5	SDF Inter-Governmental Steering Committee	13
1.10	Distribution of roles and responsibilities	14
	Table 3: Distribution of roles and responsibilities within George Municipality	16
1.11	Communications to local community.....	24
1.12	Conclusion.....	24

1.1 Introduction and background

The Integrated Development Plan (IDP) process is a process through which the municipality prepares strategic development plans for a five-year period. An IDP is the key planning instruments of local government and incorporates municipal budgets; land use management; promotion of economic development; and institutional transformation in a consultative, systematic and strategic manner.

Chapter seven of the Constitution stipulates the role of developmental local government. Municipalities are required to be accountable, responsive, consultative, and client-centric when carrying out their mandates. The IDP must reflect this paradigm shift.

The drafting and finalisation of the IDP focusses on a variety of inter-woven processes, namely: the IDP and budget alignment; performance management; harnessing limited resources; an analysis of socio-demographic and economic data for planning purposes; and guidelines for future spatial development (including the space economy) as per the Municipal Spatial Development Framework (MSDF). All of these processes and activities must be underpinned by authentic participation of communities. Through the IDP, budget and MSDF process plan George Municipality seeks to set on track an IDP process that will be highly responsive and must include the following:

- a) A programme specifying time frames for the different planning phases;
- b) Appropriate mechanisms, processes and procedures for consultation with, and participation of local communities, organs of state and other stakeholders in the IDP process; and
- c) The identification of all plans and planning requirements binding on the municipality in terms of provincial and national legislation.

George Municipality should plan, direct and manage its capacity and resources to support the successful implementation of its Integrated Development Plan and the budget. Most importantly, the Municipality should take into account the reality of limited capacity and resources in George. It consequently demands innovation and the need for greater intergovernmental cooperation between various spheres of government.

1.2 Legal Planning Context

In terms of Section 28(1) of the Local Government: Municipal Systems Act, 32 of 2000 (MSA), 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. Furthermore, Section 29 of the said Act stipulates that the process followed by a municipality to draft its Integrated Development Plan, including its consideration and adoption of the draft plan, must:

- a) Be in accordance with a predetermined programme specifying timeframes for the different steps;
- b) Through appropriate mechanisms, processes and procedures established in terms of Chapter 4 of the MSA, allow for:

- i. the local community to be consulted on its development needs and priorities;
 - ii. the local community to participate in the drafting of the Integrated Development Plan; and
 - iii. organs of state, including traditional authorities, and other role players to be identified and consulted on the drafting of the Integrated Development Plan;
- c) Provide for the identification of all plans and planning requirements binding on the municipality in terms of national and provincial legislation; and
- d) Be consistent with any other matters that may be prescribed by regulation.

Furthermore, Section 25(1) of the Local Government: Municipal Systems Act, 32 of 2000 stipulates that:

Each municipal council must, within a prescribed period after the start of its elected term, adopt a single, inclusive and strategic plan for the development of the municipality which –

- a) links, integrates and co-ordinates 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) forms the policy framework and general basis on which annual budgets must be based;
- d) complies with the provisions of this Chapter (i.e. Chapter 5); and
- e) is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation.

In addition, Section 26 of the Local Government: Municipal Systems Act 32 of 2000 stipulates the following about the **core components of integrated development plans** – 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 or provincial sectoral plans and planning requirements binding on the municipality in terms of legislation;
- e) a MSDF GAP Analysis which includes 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 4.
- j) The incoming Council to note the process plan at the first council sitting in terms of circular 6.

The national Spatial Planning Land Use Management Act 16 of 2013 (was implemented in the Western Cape in 2015 and determines that the MSDF must be prepared as part of the municipality's integrated development plan in accordance with the provisions of the Local Government: Municipal Systems Act 32 of 2000. This implies that the MSDF must be adopted concurrently with the IDP and the process prescribed for the adoption of the MSDF is parallel to the IDP. The Local Government: Municipal Systems Act 32 of 2000 does not provide for a separate process to draft, adopt or amend an SDF independently from the IDP.

1.3 The IDP Process

As clearly outlined the IDP is the principal planning document of George Municipality and it is required to capture every strategic and operational issues that the Municipality seeks to address. This represents a continuous cycle which has to be reviewed annually with 2022/2027 financial year as the first year of the current Council's five-year term.

The elected Council is the ultimate decision-making body on the IDP. Public participation is required for each stage of planning and not all participation procedures are equally suitable for each planning step. To avoid public participation fatigue and to optimise the impact, the mechanisms of public participation will have to differ from stage to stage. However, there should be an opportunity for the community that is directly involved with or affected by a specific project or programme, to comment on detail and concrete proposals.

George Municipality's approach to participatory interaction will be based on its innovative Ward Based Planning process where all 27 wards participate in the development of the Municipal IDP. This methodology presents a move away from short ad-hoc workshops where problems are listed, to an approach that analyses the richness of local contexts, identifies local strengths and opportunities and provides a platform for local action.

1.4 Contents of George Municipal IDP

The following represents the broad structure and content of the IDP (see **Table1**) which will be continuously refined by George Municipality until final approval to be in line with relevant guidelines as approved by Provincial and National Government.

Table1: Contents of the IDP

ITEM	ITEM DESCRIPTION
<p>Executive Summary</p>	<p>A concise overview of the municipality, its current situation, key challenges and opportunities, as well as the priority strategies of the municipality to improve its situation over the five-year term of the IDP, indicating the most critical targets to be achieved. This summary would respond to the following questions:</p> <ul style="list-style-type: none"> • Who are we? • What are the issues we face? • What are the opportunities do we offer? • What are we doing to improve ourselves? • What could you expect from us over the remaining years of the five-year IDP cycle? • How will our progress be measured?

	<ul style="list-style-type: none"> • How was this plan developed?
Context	A detailed status quo analysis of the Municipal area, with inputs from the Community, Community Organisations, Business, Non-Governmental Organisations, Sector Departments, and State-Owned Enterprises. This is accompanied by a Spatial Analysis. This section to be concluded by identification of priority issues in relation to: Demographic, Economic, Infrastructure and Environmental issues. This section also to reflect which entity is responsible for what service in terms of powers and functions.
Development Strategies	<p>Long Term Growth and Development Goals (Vision, Mission, Strategic Objectives and Strategies structured into 5 KPAs of the Five-Year Local Government Strategic Agenda. High Level Spatial Development Framework (SDF: Overview of Spatial Development Framework (Text and few Maps).</p> <p>Sector Involvement: Three to Five-Year Development Programme of Sector Departments, State Owned Enterprises and other stakeholders. This is not a detailed project list but an outline of key issues to be addressed by the Sector Departments, its strategies to address these issues and what the expected outcomes are within the five-year IDP term. Implementation Plan: Three Year Implementation Plan with committed Human and Financial Resources</p> <p>Projects, Plans and Activities: One Year detailed Operational Plan that will be translating to Service Delivery Budget Implementation Plan (SDBIP).</p>
Financial Plan and Service Delivery Budget Implementation Plan	Municipal Budget Overview and three-year Financial Plan.
Organisational Performance Management System	<p>Key Performance Indicators for each objective and Annual Performance Report of the previous financial year.</p> <p>Include Circular 88 requirements in terms of performance planning</p>
Annexures	<ul style="list-style-type: none"> • Municipal Spatial Development Framework • Disaster Management Plan • Land Use Management (Zoning) System • Waste Management Plan • Water Services Development Plan • Housing Sector Plan • Economic Development Strategy • Infrastructure Investment Plan • Workplace Skills Plan • Human Resources Development Strategy • Organogram • Employment Equity Plan • Performance Management Systems Framework

1.5 Budget Preparation Process

The process to be followed with the preparation of the annual budget is stipulated in Section 21 of Local Government: Municipal Systems Act 56 of 2003 as follows:

- (1) The mayor of a 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) 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) any consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).
- (2) When preparing the annual budget, the mayor of a municipality must-
 - (a) take into account the municipality's integrated development plan;
 - (b) take all reasonable steps to ensure that the municipality revises the integrated development plan in terms of Section 34 of the Municipal Systems Act, taking into account realistic revenue and expenditure projections for future years;
 - (c) take into account the national budget, the relevant provincial budget, the national government's fiscal and macro-economic policy, the annual Division of Revenue Act and any agreements reached in the Budget Forum;
 - (d) consult-
 - (i) the relevant district municipality and all other local municipalities within the area of the district municipality, if the municipality is a local municipality;
 - (ii) all local municipalities within its area, if the municipality is a district municipality;
 - (iii) the relevant provincial treasury, and when requested, the National Treasury; and
 - (iv) any national or provincial organs of state, as may be prescribed; and
 - (e) provide, on request, any information relating to the budget-
 - (i) to the National Treasury; and
 - (ii) subject to any limitations that may be prescribed, to-

- (aa) the national departments responsible for water, sanitation, electricity and any other service as may be prescribed;
- (bb) any other national and provincial organ of states, as may be prescribed; and
- (cc) another municipality affected by the budget.

1.6 The MSDF Process

The process for the drafting and amendment of a MSDF is prescribed in Sections 11 to 13 of the Western Cape Land Use Planning Act; Sections 3 to 8 of the Land Use Planning By-Law for George Municipality; Section 20 of the Spatial Planning and Land Use Management Act (SPLUMA) and the Local Government: Municipal Systems Act Regulations Chapters 2 and 3. In summary the process that is proposed for the amendment of the George SDF is as follows:

- a) Notice of the proposal to amend the SDF must be published in two official languages, which notices must indicate:
 - i. The municipality's intention to amend the MSDF; and
 - ii. The process to be followed for amendment of the MSDF.
- b) A letter must be sent to the Provincial Minister advising of the intention to amend the MSDF and the process that will be followed.
- c) A register of relevant stakeholders that may be invited to comment on the draft MSDF must be populated.
- d) A Project Committee must be established, which committee must consist of
 - i. the Municipal Manager (or a municipal employee designated by the Municipal Manager);
 - ii. Municipal employees appointed by the Municipal Manager from at least the following internal departments:
 - i. IDP office;
 - ii. Spatial Planning;
 - iii. Engineering departments;
 - iv. Local Economic Development; and
 - v. Housing.
- e) The Project Committee must compile a status quo report and submit to Council for adoption.
- f) Following the adoption of the status quo report the Project Committee must compile the first draft amended MSDF and submit to Council for provisional adoption and a mandate to publish for public participation.
- g) Public participation must be conducted over a period of 60 days and includes:
 - i. Comments invited from the community/general public;
 - ii. Comments invited from interested and affected parties;
 - iii. Comments invited from the District Municipality;
 - iv. Comment invited from the Provincial Minister.
- h) The municipality may not approve the amended MSDF until comment has been received or 60 days have expired.
- i) Any comment from the parties mentioned in (g) must be taken into account.

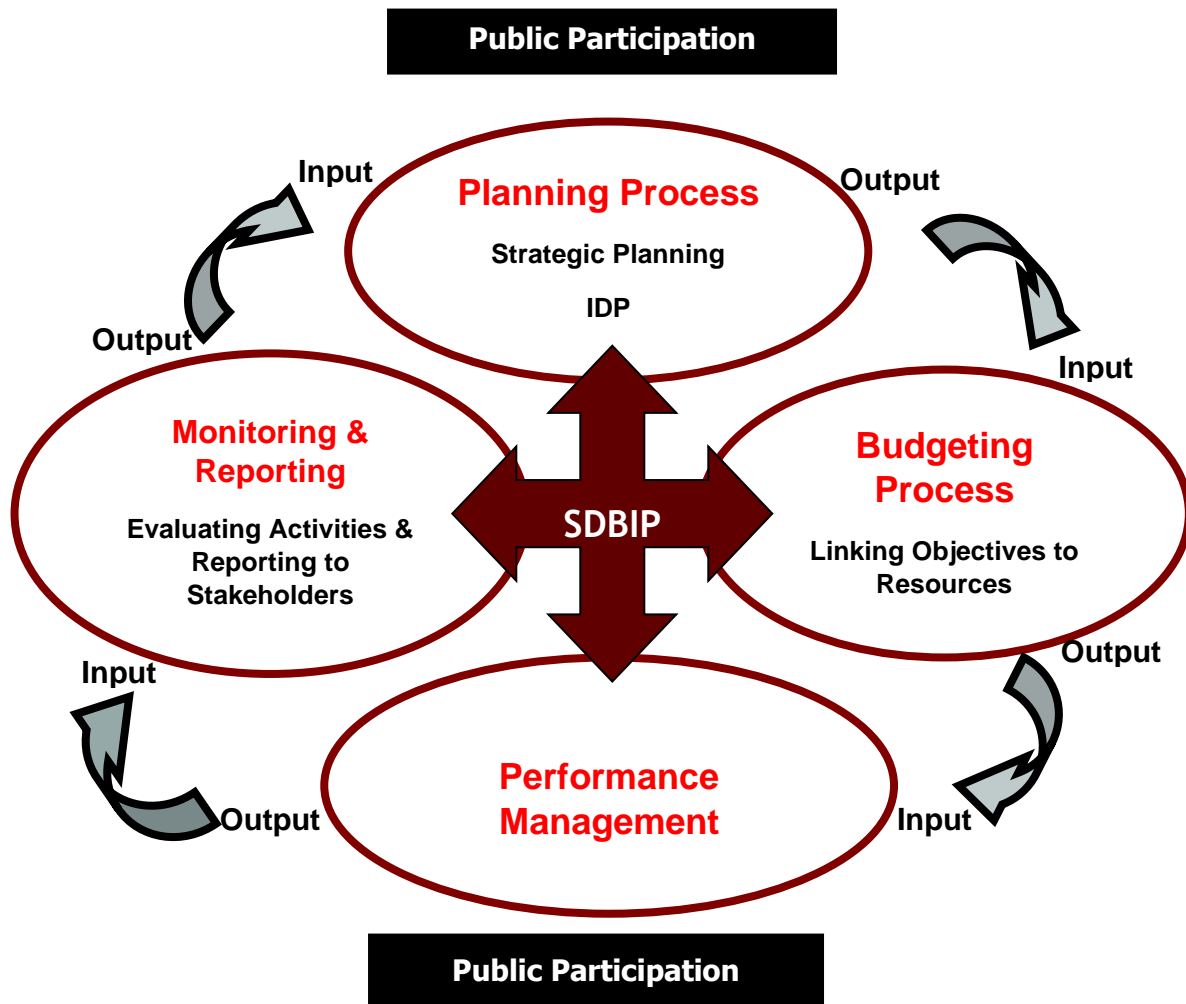
- j) A member or committee of a municipal council may introduce a proposal for amending an SDF in the Council.
- k) Any proposed amendments must be submitted to Council, accompanied by a memorandum setting out the reasons for the proposal and must demonstrate that the amendment is in line with the District Municipality's Framework for Integrated Planning.
- l) If the changes to the draft amended MSDF is materially different from the initial version that was advertised, it must be re-advertised.
- m) Council must consider all representations received in respect of the proposed amended MSDF before finally adopting the amended MSDF.
- n) Notice of the adoption of the MSDF must be published in the media and the Provincial Gazette within 14 days of the date of adoption.
- o) The Municipal Manager must within 10 days of the adoption submit a copy of the amended MSDF as adopted by Council to the MEC for Local Government for evaluation in terms of the provision of section 32 of the MSA, which submission must include:
 - i. A summary of the public participation process;
 - ii. A statement that the process set out in section 29(1) of the Local Government: Municipal Systems Act 32 of 2000 has been complied with; and
 - iii. A copy of the District's Framework for Integrated Development Planning.

1.7 Alignment between IDP, MSDF and Budget and Performance Management System (PMS)

From a developmental perspective, local government is required to work with local communities to find sustainable ways to meet the needs and improve the quality of their lives. Municipalities are encouraged to focus on realising developmental outcomes such as the provision of household infrastructure and services; the creation of liveable, integrated cities, towns and rural areas; and the promotion of economic development and community empowerment and redistribution.

The key tools available to municipalities in becoming more developmental are integrated development planning; budgeting; spatial planning; performance management and working together with local citizens and partners. **Figure 1** below depicts the integration of these tools; the monitoring of inputs, outputs and outcomes; and performance management.

Figure 1: Integrated Municipal Management: Linking Planning, Budgeting, Delivery & Monitoring



1.8 Horizontal and vertical alignment

The IDP must be aligned with all plans in place by the George Municipality and those of different government departments with resource allocations at their respective levels. The powers and functions of the different spheres of government are key tools to avoid duplication of initiatives and the funding related to those initiatives.

A key prerequisite of sound government strategy is its ability to ensure that all development intentions (irrespective of where they are located) dovetail. Section 24(3) of the Local Government: Municipal Systems Act 32 of 2000 stipulates that if municipalities

are required to comply with planning requirements of national or provincial legislation, the responsible organs of state must-

- (a) align the implementation of that legislation with the provisions of this Chapter; and
- (b) in such implementation-
 - (i) consult with the affected municipality; and
 - (ii) take reasonable steps to assist the municipality to meet the time limit mentioned in Section 25 and the other requirements of this Chapter applicable to its integrated development plan.

In other words, this instructs other organs of state to ensure that, in pursuit of their plans, they ensure that their plans, projects and activities have expression on the IDPs of local government.

1.9 Organisational arrangements

If we are to ensure successful implementation of the IDP it is imperative that clear roles and responsibilities are developed, and the institutional arrangements are clearly understood by all participants and stakeholders.

The following structures are proposed for the IDP Planning Process:

The following structures are proposed for the IDP Planning Process:

1.9.1 IDP and Budget Representative Forum

This forum is led by the Executive Mayor or a Councillor delegated by him/her. This forum is constituted by all Councillors, Senior Officials of George Municipality, interest groups, sectors, experts and government departments within the municipal jurisdiction as well as Ward Committees (each Ward Committee should be represented by at least 2 representatives on this forum). In essence the IDP and Budget Representative Forum will be mainly constituted by all local stakeholders. In order to ensure that all sectors and relevant stakeholders are notified of the IDP, Budget and MSDF process an advertisement will be placed in the local newspapers to indicate their willingness to participate. All the government departments operational within the George Municipal Area are also invited to form part of this forum to ensure that their planned projects and expenditure is consistent with the IDP of George Municipality.

The terms of reference for the IDP and Budget Representative Forum is as follows:

- a) Represent the interests of the municipality's constituency in the IDP process;
- b) Form a structured link between the municipality and representatives of the public;
- c) Provide an organisational mechanism for discussion, negotiation and decision making between the stakeholders including municipal government;

- d) Ensure communication between all the stakeholder representatives and the municipality;
- e) Monitor the performance of the planning and implementation process;
- f) Integrate and prioritise issues, strategies, projects and programmes and identify budget requirements; and
- g) Monitor the performance of planning and implementation process.

1.9.2 IDP and Budget Steering Committee

The IDP and Budget Steering Committee would convene monthly/quarterly to assess progress particularly on the strategic inputs into the IDP formulation process. It is constituted by the members of the Mayoral Committee and Senior Management. Whenever it is required, the IDP Steering Committee may extend an invitation to other organisations or individuals for expert advice. The relevant government departments may also be invited into this forum as and when required.

The terms of reference for the IDP and Budget Steering Committee are as follows:

- a) Facilitate terms of reference for the various planning activities associated with IDP;
- b) Commission studies necessary as may be required for the successful compilation of the IDP;
- c) Process and document:
 - Inputs from sub-committee(s), study teams;
 - Inputs from provincial sector departments and service providers;
 - Process, summarise and document outputs;
 - Make content and technical recommendations;
 - Prepare, facilitate and document meetings;
 - Facilitate control mechanisms regarding the effective and efficient implementation, monitoring and amendment of the IDP;
 - Ensure coordination and integration of sectoral plans and projects; and
 - Ensure that the municipal budget is in line with the IDP.

1.9.3 Ward Committees

Ward Committees will be established in all 27 wards of George Municipality in accordance with applicable legislation. Ward Committees will play *inter alia*; the following roles with respect to the IDP and Budget process; namely:

- Assist the ward councillor to identify delivery needs and development challenges.
- Prioritise service delivery needs and development challenges in the ward.
- Encourage active participation of all stakeholders in the IDP and Budget process.
- Ensure meaningful interaction between the municipality and the local community.
- Provide regular feedback to the local community on ward-related issues.
- Assist with the drafting and incorporation of ward development plans into the IDP.
- Monitor the implementation of projects and programmes in the ward.

1.9.4 MSDF Project Committee

The review and drafting of the amended MSDF will be overseen, on Municipal level, by the Project Committee. Coordination with the IDP process and findings is essential hence the IDP office will be represented on this Committee. The project committee will be appointed by the Municipal Manager and must be constituted by at least the members listed in 2(d) above. In order to ensure continuous monitoring of compliance of the process and proposals with Provincial and District policies and guidelines it also advisable to request the Western Cape Provincial Government Department of Environmental Affairs and Development Planning to nominate a member of their local George offices to serve on the committee as well.

In terms of the provisions of Section 8 of the Land Use Planning By-Law for George Municipality the members of the project committee must perform the following duties in accordance with the directions of the Council (or its delegated nominee):

- (a) oversee the compilation of the municipal spatial development framework or drafting of an amendment of the municipal spatial development framework for adoption by the Council;
- (b) provide technical knowledge and expertise to the Council;
- (c) ensure that the compilation of the municipal spatial development framework or drafting of the amendment of the municipal spatial development framework is progressing according to the process contemplated in section 3(2)(a)(ii);
- (d) guide the public participation process and ensure that the registered stakeholders remain informed;
- (e) oversee the incorporation of amendments to the draft municipal spatial development framework or draft amendment of the municipal spatial development framework based on the consideration of the comments received during the process of drafting thereof;
- (f) oversee the drafting of—
 - (i) a report in terms of section 14 of the Land Use Planning Act setting out the response of the Municipality to the provincial comments issued in terms of section 12(4) or 13(2) of that Act; and
 - (ii) a statement setting out—
 - (aa) whether the Municipality has implemented the policies and objectives issued by the national minister responsible for spatial planning and land use management and if so, how and to what extent the Municipality has implemented it; or
 - (bb) if the municipality has not implemented the policies and objectives, the reasons for not implementing it.
- (g) ensure alignment of the municipal spatial development framework with the development plans and strategies of other affected municipalities and other organs of state as contemplated in section 24(1) of the Municipal Systems Act;

- (h) facilitate the integration of other sector plans into the municipal spatial development framework.

1.9.5 SDF Inter-Governmental Steering Committee

(a) Formation and Organisation

Chapter 2 of the Land Use Planning Bylaw of George Municipality, 2015 (LUPBGM,2015), as read with Section 11 of the WC Land Use Planning Act, (Act 13 of 2014) guides the establishment of an Inter Governmental Steering Committee (IGSC).

The formation of the IGSC will be sanctioned via a Council Resolution. Clause 5 of the LUPBGM,2015 states that "the Municipality must, in writing, invite written nominations for representatives to serve on the intergovernmental steering committee from the following persons or organs of state:

- i. the head of the provincial department responsible for land use planning;
- ii. the head of the provincial department responsible for environmental affairs; and
- iii. other relevant organs of state.

Clause 6 of the LUPBGM, 2015 describes the procedure when engaging with the IGSC, as follows:

- a. If the Council establishes an Inter-Governmental Steering Committee, the project committee must compile a draft *status quo* report setting out an assessment of the existing levels of development and development challenges in the municipal area and must submit it to the intergovernmental steering committee for comment.
- b. After consideration of the comments of the intergovernmental steering committee, the project committee must finalise the *status quo* report and submit it to the Council for adoption.
- c. After finalising the *status quo* report the project committee must compile a first draft of the municipal spatial development framework or first draft of the amendment of the municipal spatial development framework and submit it to the intergovernmental steering committee for comment.
- d. After consideration of the comments of the intergovernmental steering committee, the project committee must finalise the first draft of the municipal spatial development framework or first draft of the amendment of the municipal spatial development framework and submit it to the Council to approve the publication thereof for public comment in accordance with the process adopted in terms of sections 28 and 29 of the Municipal Systems Act.
- e. After consideration of the comments and representations received by virtue of the publication contemplated in subsection (4), the project committee must compile a final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework and submit it to the intergovernmental steering committee for comment.

- f. After consideration of the comments of the Inter-Governmental Steering Committee contemplated in subsection (5), the project committee must finalise the final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework and submit it to the Council for adoption.
- g. If the final draft of the municipal spatial development framework or final draft of the amendment of the municipal spatial development framework contemplated in subsection (6) is materially different to what was published in terms of subsection (4), the Municipality must in accordance with subsections (4), (5) and (6) read with the necessary changes, follow a further consultation and public participation process before the municipal spatial development framework or amendment of the municipal spatial development framework is adopted by the Council.
- h. The Council or the Project Committee may at any time in the process of compiling a municipal spatial development framework or drafting an amendment of the spatial development framework request comments from the intergovernmental steering committee.
- i. The Council must adopt the final draft municipal spatial development framework or final draft amendment of the municipal spatial development framework, with or without amendments and must within 14 days of its decision give notice of its decision in the media and the *Provincial Gazette*.

1.10 Distribution of roles and responsibilities

One of the first requirements for the planning process to ensure that there is a clear understanding of all required roles and of the stakeholders or organisations which can assume those roles.

Table 2 and 3 below illustrate the distribution of roles and responsibilities within the context of intergovernmental relations as well as internal arrangements.

Table 2: Distribution of roles and responsibilities within an intergovernmental context

ROLE PLAYER	ROLES AND RESPONSIBILITIES
George Municipality	<ul style="list-style-type: none"> • Prepare and adopt a Process Plan • Undertake the overall management and co-ordination of the planning process which includes ensuring that: <ul style="list-style-type: none"> - All relevant role-players are appropriately involved; - Appropriate mechanisms and procedures for public consultation and participation are applied; - The planning events are undertaken in accordance with the time schedule; - Planning process is related to the real burning issues in the Municipality, that it is a strategic and implementation – oriented process; - The sector planning requirements are satisfied. • Adopt and approve the IDP and MSDF. • Adjust the IDP and MSDF in accordance with the MEC for Local Government’s proposal. • Ensure that the annual business plans, budget and land use management decisions are linked to and based on the IDP.
Local residents, communities and stakeholders (civil society)	<ul style="list-style-type: none"> • Represent interests and contribute knowledge and ideas in the IDP process by participating in and through Ward Committees to: <ul style="list-style-type: none"> - Analyse issues, determine priorities and provide input; - Keep their constituencies informed on IDP activities and their outcomes; - Discuss and comment on the draft IDP; - Check that annual business plans and budget are based on and linked to the IDP; and - Monitor performance on the implementation of the IDP.
Eden District Municipality	<ul style="list-style-type: none"> • Same roles and responsibilities as governments of local municipalities but related to the preparation of a District IDP. • Fulfil a co-ordination and facilitation role by: <ul style="list-style-type: none"> - Ensuring alignment of the IDPs of the Municipalities in the District Council area; - Ensuring alignment between the district and local planning processes; - Facilitating alignment of IDPs with other spheres of government and sector departments; and - Preparing joint strategy workshops with local municipalities, provincial and national role-players and other subject matter specialists.
Provincial Government	<ul style="list-style-type: none"> • Ensure horizontal alignment of IDPs of the District Municipalities within the Province. • Ensure alignment of the MSDF with Provincial policies and frameworks. • Ensure vertical/ sector alignment between Provincial Sector Department/ Provincial Strategic Plans and the IDP process at local/district level by: <ul style="list-style-type: none"> - Guiding the Provincial Sector Departments’ participation and their required contribution to the municipal planning process; and - Guiding them in assessing draft IDPs and aligning their sectoral programmes and budgets with the IDPs. • Efficient financial management of provincial IDP grants. • Monitor the progress of the IDP processes. • Facilitate resolution of disputes related to IDP. • Assist Municipalities in the IDP drafting process where required. • Co-ordinate and manage the MEC’s assessment of IDPs.

Sector Departments and Corporate Service Providers	<ul style="list-style-type: none"> • Contribute relevant information on the Provincial Sector Departments' plans, programmes, budgets, objectives, strategies and projects in a concise and accessible manner. • Contribute sector expertise and technical knowledge to the formulation of municipal strategies and projects. • Engage in a process of alignment with District Municipalities. • Participate in the provincial management system of co-ordination.
---	--

Table 3: Distribution of roles and responsibilities within George Municipality

ROLE PLAYER	ROLES AND RESPONSIBILITIES
Municipal Council	<p>As the ultimate political decision-making body of the Municipal, the Municipal Council:</p> <ul style="list-style-type: none"> • Consider and adopt a Process Plan. • Consider and adopt the IDP. • Consider and adopt an amended MSDF.
Executive Mayor and Mayoral Committee	<p>As the senior governing body of the Municipality, they:</p> <ul style="list-style-type: none"> • Consider and recommend the Process Plan for Council approval. • Are responsible for the overall management, co-ordination and monitoring of the process and drafting of the IDP. • Approve nominated persons to be in charge of the different roles, activities and responsibilities of the process and drafting.
Ward Councillors	<p>Ward Councillors are the major link between the Municipal Government and the residents. As such, their role is to:</p> <ul style="list-style-type: none"> • Link the planning process to their constituencies and/or wards. • Be responsible for organising public consultation and participation. • Monitor the implementation of the IDP with respect to their particular wards.
Municipal Manager and / or IDP Manager	<ul style="list-style-type: none"> • Prepare the Process Plan. • Nominate persons in accordance with the functions required to oversee and finalise the drafting of the MSDF. • Undertake day-to-day management and co-ordination of the planning process. • Ensure that all relevant role-players are appropriately involved. • Nominate persons in charge of different roles. • 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. • Respond to comments on the draft MSDF 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. • Adjust the IDP in accordance with the MEC for Local Government's proposals.

<p>Head of Departments and Officials</p>	<p>As the persons in charge for implementing IDPs, the technical/sectional officials have to be fully involved in the planning process to:</p> <ul style="list-style-type: none"> • Provide relevant technical, sector and financial information for analysis for determining priority issues. • Contribute technical expertise in the consideration and finalisation of strategies and identification of projects. • Provide departmental operational and capital budgetary information. • Be responsible for the preparation of project proposals, the integration of projects and sector programmes. • Be responsible for preparing amendments to the draft IDP for submission to the Municipal Council for approval and the MEC for Local Government for alignment.
--	--

Table 4 below seeks to respond to questions such as: what needs to be done, when, how long will it take and who is responsible. This is aimed at ensuring that all role-players in the process participate to ensure the realisation and completion of the envisaged end – product. Furthermore, **Table 5** outlines for the completion of the MSDF process.

Table 4: IDP, MSDF and Budget Time Schedule of Key Deadlines 2022-2027

No	Activity Description	Responsible Person/s	Legislative Requirements	Target Date
2022/2027 IDP PROCESS				
PHASE 1 – Preparation and Pre- Planning				
1	Attend District IDP Alignment Workshop	Manager: IDP/PMS		8 June 2021
2	Table Draft 2022-2027 IDP and Budget time-line schedule process plan to executive management	Manager: IDP/PMS	(MFMA) Section 21	23 July 2021
3	Tabling of Draft DIP/Budget Process Plan to Council for approval with schedule for Public Meetings	Municipal Manager Manager: IDP	(MFMA) Section 21 (b)	29 July 2021
4	Advertise 2022-2027 process plan and dates of Public Engagements on website, local newspapers, municipal newsletter, noticeboards	IDP Manager	MSA Section 21,28 (3)	30 August 2021
PHASE 2 – Analysis and Strategy				
Performance Analysis				
1	Assess the Municipal Performance (SWOT)	Manager: IDP /PMS & PP Senior Officer: PMS		12 August 2021
2	Review of the Performance Management System (PMS)	Manager: IDP /PMS & PP Senior Officer: PMS		15 August 2021
3	Review of the Annual Performance against the SDBIP	Manager: IDP /PMS & PP Senior Officer: PMS		19 August 2021
Financial Analysis				
4	Review of the Budget related policies for the next 3 years	CFO		22 Jan 2022
5	Determine the funding/revenue potentially available for the next 3 years	CFO		
6	Refine funding policies and review tariff policies	CFO		15 March 2022
7	Assess the Municipality's financial position and capacity (based on the Financial Statements (AFS) of the previous budgeted year)	CFO	Internal Management Procedure	March-April 2022
8	Convene IDP Steering Committee Meeting	IDP Steering Committee	Internal Management Procedure	July 2022
9	Review current realities and examine changing conditions and information within each directorate: ~ Spatial ~ Legislative	Directors / Senior Management	Internal Management Procedure	September 2022

No	Activity Description	Responsible Person/s	Legislative Requirements	Target Date
10	Convene Quarterly Ward Committee Meetings to discuss IDP & Budget Process Plan	Manager IDP	Municipal Systems Act (Section 17)	November 2021
Situational Analysis				
11	Analyse the Strategic Calendar and Joint Planning Initiatives	Manager: IDP /PMS & PP Senior Officer: IDP		September 2021
12	Strategic Workshop to discuss the Analysis Phase	MM/Senior Managers/IDP Manager and IDP Senior Officer	Municipal Systems Act	September 2021
13	Strategic Workshop to discuss the Strategic Objectives	Political Leadership		October 2021
14	Adoption of the 2021/2022 IDP by incoming Council	Manager: IDP /PMS & PP Senior Officer: IDP		March 2022
Consultation				
15	Publish online public participation process	Manager: IDP /PMS & PP Senior Officer: IDP	Municipal Systems Act (Section 28 (1))	September 2021
16	Sector representatives / Sector participation in the IDP/Budget process	Manager: IDP /PMS & PP Senior Officer: IDP CFO		October 2021
17	Media awareness Campaign	Comms		October 2022
18	Ward based planning/priorities	Manager: IDP /PMS & PP Senior Officer: IDP	Municipal Systems Act	October 2022
19	IGR Engagements to obtain sector budget commitments	Manager: IDP /PMS & PP Senior Officer: IDP	Municipal Systems Act	November 2022
20	Intergovernmental Alignment (Provincial & District)	Manager: IDP /PMS & PP Senior Officer: IDP	Municipal Systems Act	November 2022
Strategy				
21	Update of financial plan	CFO	Internal Management Procedure	November 2022
22	Workshop: MAYCO & Directors to discuss new developmental objectives	Municipal Manager	Internal Management Procedure	November 2022
23	Workshop with Council to review the Vision, Mission, Strategic objectives and refine the SDF	Municipal Manager		November 2022

No	Activity Description	Responsible Person/s	Legislative Requirements	Target Date
Other activities during this phase				
23	Section 71 Report / Grant report for August and September	CFO	MFMA	August 2022
24	District IDP Managers Forum	Manager IDP		December 2022
25	Provincial IDP Managers Forum	Manager: IDP /PMS & PP		December 2022
PHASE 3 – Preparation and Tabling				
1	Submit Draft IDP to Director Development Planning with process public participation programme	Manager IDP	Internal Management Procedure	31 January 2022
2	Table Draft 5-year IDP and Draft Capital Budget to Executive Management	Manager IDP	Internal Management Procedure	7 February 2022
3	Attend Provincial IDP INDABA 2	Manager IDP	Internal Management Procedure	February 2022
4	Table of 2019 MSDF GAP Analysis and status quo and re-adoption of 2019 MSDF Draft	Director Development and Planning	Spatial Planning Legislation	24 February 2022
5	LGMTEC 2- Municipality receive inputs from National and Provincial Government and other institutions (Grant Allocations)	CFO Budget Office	DORA	28 February 2022
6	Table Draft IDP, Budget and SDBIP to Steering Committee for final overview, inclusiveness and quality check	Municipal Manager	MFMA (MBRR Section 14(2))	7 March 2022
7	Workshop Draft 5-year IDP, Budget, SDBIP and proposed tariffs for 2022-2023 with Council	Municipal Manager	Internal Management Procedure	10 March 2022
8	Municipal Manager presents draft IDP, MSDF Gap Analysis, Budget and Budget Related policies to the Mayor for perusal and tabling to Council	Municipal Manager	MSA Section 30 (c) and MFMA Section 21	March 2022
9	Mayor Table Draft 5-year IDP, MSDF Gap Analysis, SDBIP, Budget and Budget Related and public participation programme to Council	Executive Mayor	MFMA Section 22 and 23 MSA Reg 3(4)	31 March 2022
Publication and Public Consultation Process				
PHASE 4 – Consultation				
1	Start process to institutionalise ward committees	Manager: IDP PP Unit		November 2021
2	Make public of Draft IDP, MSDF Gap Analysis and Budget for public comment and consultation	Manager: IDP Budget Office	MFMA Section 22 (a) MSA Section 21 A	March-April 2022
3	Submission of Draft IDP and tabled annual budget and draft SDBIPs to National and Provincial Treasuries and Department of Local Government in both printed and electronic formats	Manager: IDP Budget Office	MFMA Section 22(b) MBRR 15(3)(b) & 15(1)	Immediately after tabling to Council
4	Consult Public on Draft IDP and Budget. Public engagements via e-public participation	Manager: IDP	MFMA Section 22 & 23	April 2022
5	Consult public on Draft IDP and Budget. Public Participation meetings in all wards	Manager: IDP	MFMA Section 22 & 23	April 2022

No	Activity Description	Responsible Person/s	Legislative Requirements	Target Date
6	LGMTEC 3/SIME- Provincial analysis (PT and DLG) of the 5-year draft IDP & Budget	Municipal Manager Directors Budget Office Manager: IDP	MFMA Section 34	April 2022
7	Deadline for Public inputs on IDP and Budget	Manager: IDP	MSA Section 21	April 2022
8	Executive Management analyse public comments on Draft IDP and Budget and prepare report with recommendations for Council's perusal	Manager: IDP CFO Mun Manager	MFMA Section 22 (a) MSA Section 21 A	May 2022
PHASE 5 – Approval of IDP and Budget				
1	Table Final 2022/23 revised IDP, MSDF Gap Analysis and Budget and Tariffs to the Budget Steering Committee for final overview, inclusiveness and quality check.	Municipal Manager	MFMA MBRR Section 14 (2)	May 2022
2	Workshop final 2022/23 revised IDP, MSDF Gap Analysis and Budget and tariffs for 2022/23 with Council.	Municipal Manager	Internal Management Procedure	May 2022
3	Council considers comments from all stakeholders (including LGMTEC 3 report) on draft IDP, MSDF Gap Analysis and Budget and revise IDP and Budget accordingly if necessary.	Municipal Manager CFO Council	Municipal Systems Act	26 May 2022
4	Table 2022/23 final IDP, MSDF Gap Analysis and Budget, Tariff List and budget related policies to Council for approval.	Mayor/CFO and Municipal Manager	MFMA Section 24 and 25 MSA Reg 2(1)	31 May 2022
5	Submission of approved final IDP and Budget to National and Provincial Treasuries in both printed and electronic formats.	Budget Office Manager: IDP	MFMA Section 24(3) MBRR Regulation 20	10 days after council approval
6	Publish the approved 2022/23 revised IDP and Budget on municipality's website.	Budget Office Manager: IDP	MFMA Section 22 MBRR Section 18	5 days after council meeting
7	Submission of 2022/23 revised IDP to MEC of Local Government.	Manager: IDP	MSA Section 32(1)	10 days after final approval
8	Response / Feedback to public comments in respect of IDP. Budget, tariffs and policies.	CFO Manager: IDP	MFMA	15 June 22

Table 5: Draft Programme for completion of the review and amendment of the MSDF, 2019 – 2022/2027

No	Activity Description	Responsible Person/s	Target Date	Completion Date
1	INITIATION REVIEW & AMENDMENT		Jul - Aug 2021	
1.1	Item to proceed with Review & Amendment, PC, ISC, MEC Letter & Media notice	Snr Spatial Planner / DD: Planning	Jun 21	Jun 21
1.2	Process Plan finalized, DEA&DP workshop	Snr Spatial Planner	26 Jul 21	26 Jul 21
1.3	Council Resolution		29 Jul 21	
1.4	Notify DEA&DP of Resolution, Inception Report, meeting schedule	Snr Spatial Planner / DD: Planning	30 Jul 21	
1.5	Notify MEC	Snr Spatial Planner / DD: Planning	30 Jul 21	
1.6	Constitute Municipal Project Committee	Municipal Manager / Director		
1.6.1	Receive nominations (completed); Memo to Office of the MM confirming the PC	Snr Spatial Planner	30 Jul 21	
1.6.2	Confirmation of members; Schedule meetings	Snr Spatial Planner / DD: Planning	06 Aug 21	
1.6.3	Inception meeting	Snr Spatial Planner / DD: Planning	12 Aug 21	
1.7	Constitute IGSC	Municipal Manager/ Director		
1.7.1	Invitation to Nominations members	Snr Spatial Planner / DD: Planning	06 Aug 21	
1.7.2	Confirmation of IGSC members	Municipal Manager / Director	20 Aug 21	
1.7.3	Schedule of meetings to all and Inception documentation circulated	Snr Spatial Planner / DD: Planning	20 Aug 21	
1.8	Notify Public	Snr Spatial Planner / DD: Planning		
1.8.1	Notice published & Media Statement issued	Snr Spatial Planner / DD: Planning	24 Aug 21	
1.8.2	Notice to I&AP's	Snr Spatial Planner / DD: Planning	24 Aug 21	
1.8.3	Public Input Period 30 Aug to 30 Sept			
2	REVIEW, GAP ANALYSIS, STATUS QUO		Jul21-March22	
2.1	Data Sets Analysis: Gaps	Snr Spatial Planner	27 Aug 21	
2.2	Gap Analysis of George CEF	Snr Spatial Planner	03 Sep 21	
2.3	MSDF Implementation Assessment	Snr Spatial Planner	03 Sep 21	
2.4	Policy/Strategy Gap Analysis	Snr Spatial Planner	03 Sep 21	
2.5	Departmental comments/workshop and PC Meeting	Snr Spatial Planner	22 Oct 21	
2.6	Analysis from I&AP's input on MSDF2019	Snr Spatial Planner	22 Oct 21	
2.7	Finalize Gap Analysis (Collation): Table and Action Plan	Snr Spatial Planner	29 Oct 21	
2.8	1st Draft Updated Status Quo Report, PC workgroups input	Snr Spatial Planner / DD: Planning	19 Nov 21	
2.9	Update: 2nd Draft Status Quo Report	Snr Spatial Planner	09 Dec 21	
2.10	Amended Status Quo Draft Report issued for comment to PC	Snr Spatial Planner / DD: Planning	07 Jan 21	
2.11	IGSC comment on Draft 2 Status Quo			
2.11.1	IGSC Comment Period		18 Feb 22	

2.11.2	Meeting with IGSC to go through issues with document	Snr Spatial Planner	25 Feb 22	
2.12	Update/Corrections: Final Status Quo Report complete	Snr Spatial Planner	31 Mar 22	
2.13	Council adoption of MSDF- & CEF Review Reports and Status Quo; Re-adoption of MSDF2019	Director / DD: Planning	27 May 22	
3	GMSDF 2023			
3.1	Draft GMSDF 2023		15 Jul 22	
3.2	Departmental Review	Snr Spatial Planner	12 Aug 22	
3.3	First Draft GMSDF issued for comment	Snr Spatial Planner		
3.3.1	Refer 1st Draft GMSDF2023 to IGSC & PC for comment = 21 days	Snr Spatial Planner / DD: Planning	19 Aug 22	
3.3.2	Receive comment on 1st GMSDF2023 Draft SDF from IGSC & PC	Snr Spatial Planner	16 Sep 22	
3.3.3	Consider PC & IGSC comment:1st Draft GMSDF; Response Report	Snr Spatial Planner	07 Oct 22	
3.4	Second Draft GMSDF2023	Snr Spatial Planner	14 Oct 22	
3.4.1	Submit 2nd draft MSDF2023 to Mayco for comment	Snr Spatial Planner / DD: Planning	21 Oct 22	
3.4.2	Second draft MSDF 2023 to IGSC & PC for review (21 days); meetings to discuss	Snr Spatial Planner / DD: Planning	18 Nov 22	
3.4.3	Refer Draft2 GMSDF, with MSDF Proposals and Implementation Report, to Mayco for approval for publication for public comment	Director / DD: Planning	15 Dec 22	
3.4.4	Place advertisement + Prov. Gaz. + Media + Open Houses = 60 days (SPLUMA)	Snr Spatial Planner	15 Dec 22	
3.4.5	Receive comments on 2nd draft SDF from public (10 Jan to 10 March2023)	Snr Spatial Planner	10 Mar 23	
3.5	Third Draft GMSDF2023		06 Apr 23	
3.5.1	Refer 3rd draft GMSDF2023 to IGSC & PC for comment	Snr Spatial Planner / DD: Planning	14 Apr 23	
3.5.2	Receive comment on 3rd draft SDF from IGSC & PC	Snr Spatial Planner	21 Apr 23	
3.5.3	Consider comment on 3rd draft SDF from IGSC & PC and finalise SDF	Snr Spatial Planner	26 Apr 23	
3.5.4	Refer Final SDF to IDP Office for inclusion into the IDP	Snr Spatial Planner / DD: Planning	26 Apr 23	
3.5.5	Final SDF serves as part of IDP before Council	Director / DD: Planning	31 May 23	
3.6	Adopted GMSDF2023		May 2023	
3.6.1	Adopted GMSDF2023 to MEC for Local Government within 10 days of adoption (See Section 32(1) of the MSA)	Director / DD: Planning	08 Jun 23	
3.6.2	Municipal Manager (within 10 days of the adoption of the MSDF); Submit notice of decision to adopt, GMSDF2023 & response report to comments of the IGSC to Provincial Minister	Director / DD: Planning	08 Jun 23	
3.6.3	Give notice in the Provincial Gazette and media of decision (within 14 days of decision)	Director / DD: Planning	15 Jun 23	

1.11 Communications to local community

George Municipality will through appropriate mechanisms and procedures established in accordance with Chapter 4 of the Local Government: Municipal Systems Act 32 of 2000 create opportunities for continuous engagement and communication with the local community.

1.12 Conclusion

George Municipality will utilise the 2022/2027 IDP, MSDF and Budget Process Plan as a 'roadmap' to guide the planning, drafting, adoption and review of its IDP including any related planning instruments as envisaged in Section 28(1) of the Local Government: Municipal Systems Act 32 of 2000.