



FINAL IDP/ BUDGET AND PMS PROCESS PLAN 2025/26

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1. INTRODUCTION

IDP, Budget & PMS Process Plan is meant to guide the planning, drafting adoption and review of its Integrated Development Plan for the year under review. Once the IDP Process has been adopted by municipal council, it becomes a legally binding document that the municipality has to adhere to at all material times.

The Process Plan has to be submitted to all Stakeholders for alignment of their Plans and Programs.

2. LEGAL CONTEXT

- Section 28 (i) of the MSA 32 of 2000, dictates that each municipal council must adopt a process set out in writing to guide the planning, drafting, adoption and review of its Integrated Development Plan.
- Section 29 (i) of the said Act further stipulates the process to be followed when drafting its integrated development plan including its consideration and adoption of the draft process plan that it must be in accordance with a program specifying time frames for the different steps.

3. OBJECTIVES

- To draw up a process plan that would trigger inclusivity and transparency,
- It is to encourage participation by all stakeholders,
- To solicit and determine priorities of the municipality, and
- To enhance service delivery and development.

4. INSTITUTIONAL ARRANGEMENTS, ROLES AND RESPONSIBILITIES.

ACTORS	ROLES AND RESPONSIBILITIES
Council	<ul style="list-style-type: none">• Considers and adopts IDP.• To promote and enhance public participation.• Keep public informed about the contents of the IDP.• Adopts the Integrated Development Plan, Budget and SDBIP.
Municipal Manager	<ul style="list-style-type: none">• Ensures that the Process Plan and IDP are developed and adopted by the Council.

ACTORS	ROLES AND RESPONSIBILITIES
	<ul style="list-style-type: none"> • Manages the local municipal IDP by ensuring that all daily planning activities are performed within an efficient and effective consideration of available time, financial and human resources. • Encourages an inclusive participatory planning process and compliance with action programmes. • Facilitates the horizontal and vertical alignment of the district IDP. • Ensures that the planning process outcomes are properly documented. • Manages service providers to the district or local municipal IDP. • Coordinates with various government departments and ensures that all the projects, strategies and objectives of the local municipality are shared and distributed amongst government departments so that they might incorporate them in their planning process and vice versa. • Provides clear terms of reference to service providers.
Heads of Departments and Senior Management	<ul style="list-style-type: none"> • Provide technical and advisory support to the Municipal Manager. • Perform daily planning activities including the preparation and facilitation of events; documentation of outputs and making recommendation to the Municipal Council. • Interact with the relevant cluster regarding the prioritization of their individual departments' projects and programmes for the following years.
District Municipality	<ul style="list-style-type: none"> • Provide support and guidance on IDP processes. • Assist municipalities to achieve the target dates. • Interact with service providers to ensure that a quality product is provided. • Assist with workshops. • Project Management and Implementation Support Services • Ensure that clusters achieve integrated planning. • Ensure that a uniform reporting mechanism is devised.
Sector Departments in the District	<ul style="list-style-type: none"> • Ensure the participation of Senior personnel in the IDP process. • Horizontal alignment of programmes and strategic plans within the clusters. • Provide technical support and information to the planning process. • Contribute relevant information to support the process within the clusters. • Incorporate district and local municipal projects into departments planning within the clusters.
National & Provincial Governments	<ul style="list-style-type: none"> • Monitor and evaluate the preparation and implementation process. • Provide training and capacity building support to the local municipality – CoGTA guide for credible IDPs. • Coordinate support programmes so that overlapping does not occur. • Provide technical guidance and monitor compliance with provincial policy and legal framework

ACTORS	ROLES AND RESPONSIBILITIES
	<ul style="list-style-type: none"> • Provide financial support to the IDP planning and implementation process

5. ORGANISATIONAL ARRANGEMENTS: ESTABLISHMENT PROCESS

5.1 The Municipal Council

King Sabata Dalindyebo Municipal Council is chaired by the Honorable Speaker. The role of council in the IDP formulation process is to oversee drafting of the process to be followed to guide the development and drafting of the IDP Plan Review for 2024/25. Chapter 5 Section 25 (1) of the MSA provides 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 includes the following:

- To oversee the development and adoption of the IDP review
- Adopt final Integrated Development Plan and Budget
- Links, integrates and coordinates plans and takes into account proposals for the development of the municipality.
- Aligns the resources and capacity of the municipality with the implementation of the plan;
- Complies with the provisions of this Chapter; and
- Is compatible with national and provincial development plans and planning requirements binding on the municipality in terms of legislation.

5.2 IDP Steering Committee

The IDP steering committee is chaired by the municipal manager comprising largely of internal senior management which is tasked to:

- Provide technical and advisory support to the Municipal Manager;
- Perform daily planning activities including the preparation and facilitation of events; documentation of outputs and making recommendation to the Municipal Manager and the Municipal Council;
- Prepare, facilitate and document meetings; and
- Prepare reports for the IDP Representative Forum.

Secretariat: -

IDP Unit –

It acts as a the secretarial of the IDP steering committee.

5.2.1 Composition of IDP Steering Committee

- The Municipal Manager
- Chief Operations Officer
- Director: Rural & Economic Development
- Chief Financial Officer
- Director: Infrastructure
- Director: Human Settlement
- Director: Corporate Services
- Director: Community Services
- Director: Public (Community) Safety
- General Managers and Middle Management
- Appointed Professional team

Meetings shall be held as per the Process Plan adopted by Council or when considered necessary by the chairperson.

5.3 IDP Representative Forum & Its Composition

The IDP representative forum shall be chaired by the Executive Mayor. The composition of IDP representative is made up by the following institutions or interest groups:-

- National and Provincial Sector Departments and the District Municipality
- All Councillors
- Ward Committee secretaries
- Youth groups
- Rate payers
- Labour Unions
- Traditional Leaders
- Civic bodies & Entities

- Faith Organisations
- NGO's and CBOs
- Community Development Workers
- Organised Business
- Resource persons; and
- Relevant Community representatives.

5.4 The task of the IDP Representative Forum shall be to:

- Represent the interest of various constituencies in the IDP planning process.
- Provide an organizational platform and mechanism for discussion, negotiation and decision making between stakeholders.
- Provide a communication mechanism for the exchange of ideas and opinions among the various stakeholder interest groups.
- Participate in the setting up of key performance indicators including the monitoring thereof in line with the performance Management Manual of the Local Municipality
- Monitor the performance of the planning and implementation process.

5.5 Budget Steering Committee

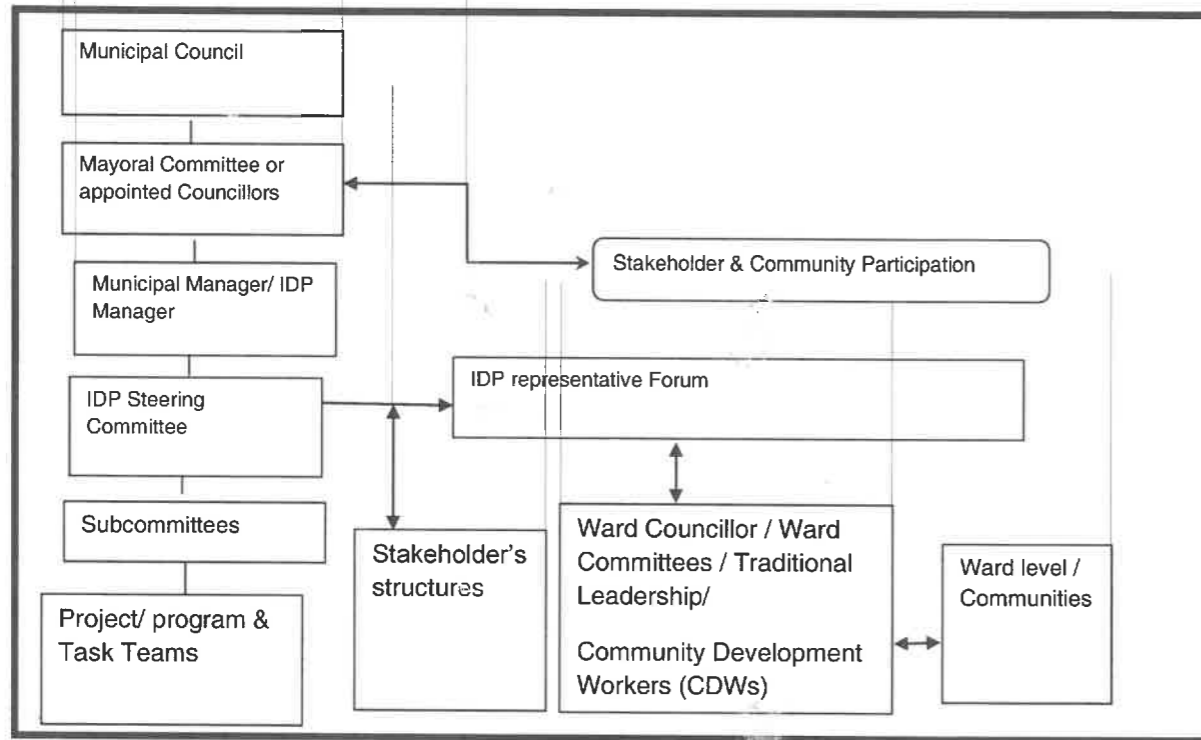
The Budget Steering Committee has a responsibility of recommending the budget document before the approval by council. This is chaired by the Portfolio Councilor for Finance.

5.4.1. Composition of the Budget Steering Committee

- Portfolio Councilor for Finance
- Portfolio Councilors for Service Departments
- Municipal Manager
- Chief Financial Officer
- Director: Infrastructure
- Director: Human Settlement
- Director: Corporate Services
- Director: Community Services
- Director: Public (Community) Safety
- Appointed Professional team

Meetings shall be held as per the Process Plan adopted by Council or when considered necessary by the chairperson.

5.6 IDP Process Stakeholders



EVALUATION FRAMEWORK FOR THE IMPLEMENTATION OF IDP, BUDGET & PMS PROCESS PLAN 2023/24

PURPOSE

- This evaluation framework is meant to make assessment during the implementation of the 2024/25 IDP Process Plan with the aim of improving compliance and performance as well as closing gaps in the current 2024/2025 draft IDP Process Plan.
- Our assessment is broken down by developing a template that shows all the phases, activities, challenges and recommendations during the implementation of the 2024/25 IDP Process Plan.

PHASES	ACTIVITIES CONDUCTED	CHALLENGES	RECOMMENDATIONS
PHASE 0 PRE-PLANING PHASE	Development of draft IDP/ Budget and PMS Process Plan was adopted in line with the MSA 32 of 2000	Poor adherence to IDP Process Plan by some IDP Stakeholders.	IDP Stakeholders must align their activities & dates with the Institutional Calendar and IDP Process Plan.
	Alignment of draft IDP Process Plan with OR. Tambo District Municipality Framework and Institutional Calendar was also conducted	OR. Tambo is not taking the alignment of Process Plan and its draft framework very serious as a result we experience the clash of activities between KSD and OR. Tambo for example Council meetings IDP Representative Fora.	OR. Tambo must adhere to its Framework Plan as approved by Council. Be encouraged to take the Process Plan of the local municipality as the priority for the smooth participation in the IDP.
	Consultation with IDP Stakeholders. Consultation process to discuss the drafting of the IDP Process Plan was also conducted with both internal and external structures.	Poor participation by Government departments at this stage and they seem not to understand their roles in this phase.	The stakeholders must adhere to the Process Plan as presented to them and approved by Council that will reduce the incidents of poor attendance and clash of activities.
	IDP Assessment by MEC'S office of the department of COGTA was conducted.	Issues raised in the assessment report are not attended timeously and are always left hanging which hampers the credibility of the IDP.	Directors are urged to attend to the MECs comments timeously.
	WARD BASED PLANS Out of 37 wards only five ward plans were developed	Lack of capacity and funding to develop the ward-based plans.	Provincial COGTA must provide support to the development of ward Based plans.

PHASES	ACTIVITIES CONDUCTED	CHALLENGES	RECOMMENDATIONS
	<p>IDP AWARENESS PROGRAMME</p> <p>IDP Unit has conducted IDP Awareness Programmes.</p> <p>Data Capturing</p> <p>Capturing of the information from the IDP Roadshows is done by two IDP Clerks and two Interns.</p>	<p>Poor understanding of IDP concept, its Phases and Processes.</p> <p>Poor quality of capturing due to unavailability of dedicated data capturers.</p>	<p>KSD must also make budget provision for this project</p> <p>Continuous IDP workshops are recommended.</p> <p>Provision of data capturers to IDP unit is highly recommended.</p>
<p>PHASE 01: DEVELOPMENT OF SITUATIONAL ANALYSIS</p> <p>September/ October</p>	<p>ACTIVITIES CONDUCTED</p> <p>Revision of Draft Situational Analysis.</p> <p>Collection of information from internal and external Stakeholders.</p> <p>Conduct IDP Roadshows or Community Consultations.</p>	<p>CHALLENGES</p> <p>Some Government Departments are still confusing this Phase with the submission of Projects.</p> <p>Late submission of information by some internal Departments.</p> <p>Lack of researched information is a challenge.</p> <p>Poor attendance of IDP Ward meetings by community members due to</p>	<p>RECOMMENDATIONS</p> <p>Government Departments need to be workshopped annually on this Phase of IDP.</p> <p>Speedy submission of information by internal departments to IDP Unit is encouraged.</p> <p>Establishment of research unit is recommended.</p> <p>Publicity by Ward Councillors and Ward Committee members must be intensified.</p>

PHASES	ACTIVITIES CONDUCTED	CHALLENGES	RECOMMENDATIONS
		lack of transportation and effective publicity.	Transportation arrangements for community members is encouraged.
PHASE 02: DEVELOPMENT OF STRATEGIES & OBJECTIVES October /November	ACTIVITIES CONDUCTED Development of Objectives and Strategies	CHALLENGES SMARTNESS is still a challenge	RECOMMENDATIONS The SMARTNESS should be encouraged.
PHASE 03: PROJECTS IDENTIFICATION January/February	ACTIVITIES CONDUCTED Submission of projects	CHALLENGES Late submission of Projects by Sector Departments.	RECOMMENDATIONS Synergy between alignment of financial year circles is encouraged.
PHASE 04: INTEGRATION January/ February	ACTIVITIES CONDUCTED Integration and Alignment of Plans & Programmes	CHALLENGES Institutional Strategic Planning Session is not aligned to this Phase	RECOMMENDATIONS Alignment of strategic Planning sessions with the Phase to allow government departments who wait on the SONA, SOPA, Budget Speech and APPs
PHASE APPROVAL March/ April	ACTIVITIES CONDUCTED Consideration of public comments on the Draft IDP before its adoption,	CHALLENGES Poor submission of public comments.	RECOMMENDATIONS Improvement on Public Participation strategies.

IDP PROCESS PLAN KEY DEADLINE DATES AND BUDGET TIMELINES

5.7 Project Plan Activities and Timelines

Activity	Risk	Periods															
		20-Jul	20-Aug	20-Sep	20-Oct	20-Nov	20-Dec	21-Jan	21-Feb	21-Mar	21-Apr	21-May					
	Very High	Draft IDP Process Plan															
	Very High		Adoption of IDP Process Plan														
	Very High			IDP/Budget Framework													
	Moderate High			IDP Awareness Campaign													
	Moderate High			IDP Outreach Programme													
	Very High				Development of Situational Analysis Report												
	Very High				Development of Objectives & Strategies												
	Very High				Project Formulation & Budget Integration												Strategic Planning

Activity	Risk	Periods											
		20-Jul	20-Aug	20-Sep	20-Oct	20-Nov	20-Dec	21-Jan	21-Feb	21-Mar	21-Apr	21-May	
	Very High									Tabling of IDP			
	High										IDP Road shows		
	High										IDP to Internal Audit		
	High										IDP to APAC		
	Very high												Adoption of IDP

5.8 IDP Process Plan Activities.

Section 28 of the Municipal Systems Act, 32 of 2000, stipulates that when drafting IDP Process Plan it must reflect Activities, Legal Sources, Time frames, Responsible persons and Progress made as indicated below.

IDP Unit must also make consultations with relevant offices of OR. Tambo, BTO, PMS, IGR and Internal Audit office for proper alignment of time frames and activities.

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
JULY 2024				
Consultation with BTO, PMS, IGR and Internal Audit on Draft IDP/BUDGET & PMS Process Plan 2025/26.	Section 28 of the MSA 32 of 2000, reads with section 21 of the MFMA 56 of 2003	01-10 July 2024	Manager IDP	Achieved
Submission of Quarter 4 & APR by Departments	Section 27 of MSA 32 of 2000	08 July 2024	PMS Manager	Achieved
Submission of SDBIP & Performance Agreements to MEC	Section 35 of the MFMA 56 of 2003	12 July 2024	PMS Manager	Achieved
MANCOM/Steering Committee meeting to present the Draft IDP Process Plan 2025/26	Section 16 of the Municipal Systems Act No. 32 of 2000.	15 July 2024	IDP Manager	Not Achieved (postponed to 5 August 2024)
Make public the approved SDBIP	MFMA 53 (3) (a)	17 July 2024	PMS Manager	In planning
Print and distribute final Approved 2024/25 SDBIP	MFMA Guidance	17 July 2024	PMS Manager	Achieved
IDP/Budget/PMS Framework Workshop	Section 16 {b} Municipal Systems Act, 32 of 2000	17 July 2024	CFO	Achieved
Alignment of 2025/26 Draft Process Plan with Draft IDP District Framework & Process Plan of O R Tambo District Municipality.	Section 27 of the MSA 32 of 2000	22-25 July 2024	Manager IDP	Achieved
Mayoral Committee	Institutional Calendar	22 July 2024	Executive Mayor	Achieved
Finalize 2023/24 Performance Agreements.	MSA 57 (2)/ MFMA 69 (3) (b)	31 July 2024	PMS Manager	
AUGUST 2024				
Commence with compilation of Annual Report 2024/25	Section 121 of MFMA 56 of 2003	01 August 2024	PMS Manager	
Make public signed Performance Agreements	MFMA 53 (3) (b)	05 August 2024	PMS Manager	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Submit signed Performance Agreements to COGTA	MFMA 53 (3) (b)	05 August 2024	PMS Manager	
Ward Councilor's Forum to present IDP, Budget & PMS Process Plan.	Section 16 of the Municipal Systems Act, 32 of 2000:	06 August 2024	Manager IDP	
IDP Refresher Workshop for IDP staff members.		08 August 2024	IDP Manager	
Annual Assessment of the IDP by MEC of Provincial COGTA	Section 31 of the MSA 32 of 2000.	12– 16 August 2024	Municipal Manager	
Mayoral Committee to discuss Draft IDP Process Plan 2025/26	Section 30 of MSA 32 of 2000	15 August 2024	Executive Mayor	
Submission of unaudited Draft Annual Report to MAYCO	MFMA Guidance	22 August 2024	PMS Manager	
Planning, IGR & Research Standing Committee meeting	Intergovernmental Relations Framework 13 of 2005	22 August 2024	Municipal Manager	
Submission of APR and AFS to APAC	Section	23 August 2024	Municipal Manager	
Council considers IDP, Budget and PMS Process Plan 2025/26 for Adoption and APR & AFS	Section 16 of the Municipal Systems Act No. 32 of 2000	29 August 2024	Executive Mayor	
O.R Tambo Representative Forum	Municipal Systems Act No. 32 of 2000	29 August 2024	O.R Tambo Executive Mayor	
O.R Tambo Council Meeting	Institutional Calendar	30 August 2024	O.R Tambo DM	
Roll-over application and submission to Treasury	Section 121 of the MFMA, 56 of 2003	30 August 2024	CFO	
Submit Draft Annual Report to AG, National Treasury & COGTA	MFMA Circular 63	31 August 2024	PMS Manager	
Roll-over application and submission to Treasury.	Section 121 MFMA 56 of 2003	31 August 2024	CFO	
Submission of APR & AFS to AG & Treasury.	Section 21 of the MFMA 56 of 2003	31 August 2024	Municipal Manager	
SEPTEMBER 2024 (IDP MONTH)				

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Technical IGR meeting	Intergovernmental Framework 13 of 2005	03 September 2024	Manager IGR	
Submission of IDP, Budget and PMS Process Plan to OR Tambo DM and other Spheres of Government and all stakeholders.	Section 21 of the MFMA 56 of 2003: Budget Preparation Process read with Section 28 (1) of the Municipal Systems Act, 32 of 2000	04 September 2024	Manager IDP	
Executive Management/Steering committee meeting to present IDP Roadshows Itinerary.	Municipal Systems Act no 32 of 2000	09 September 2024	Municipal Manager	
Advertise IDP/ Budget and PMS Process Plan on the local print media	Section 21 of the MFMA 56 of 2000 read with Section 28 (1) of the Municipal Systems Act, 32 of 2000	09 September 2024	Manager IDP/ Budget Accounting/ Communications	
Ward Councillors Forum to present itinerary for the Community Consultations (Ward to Ward IDP Outreach Programme)	Section 16 of the Municipal Systems Act, 32 of 2000:	10 September 2024	Manager IDP	
IDP Awareness Programme to Community Structures & Municipal Officials.	Section 16 of MSA 32 of 2000	11-16 September 2024	IDP Manager	
Mayoral Committee to present IDP Roadshows Itinerary.	Institutional Calendar	12 September 2024	Executive Mayor	
Submission of personnel request forms/Staff keys consultations	Section 21 MFMA, 56 of 2003	17-20 September 2024	CFO	
Community Consultations on IDP/Budget/PMS Roadshows to	Section 16 of the MSA 32 of 2000	17 – 30 September 2024	Executive Mayor	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
conduct Situational Analysis in all wards.				
Political IGR forum meeting	Intergovernmental Framework 13 of 2005	20 September 2024	IGR Manager	
Ordinary Council meeting.	Institutional Calendar	26 September 2024	Executive Mayor	
O.R Tambo Council meeting	Institutional Calendar	27 September 2024	Executive Mayor	
OCTOBER 2024				
Submission of Quarter 1 Performance Report by Departments.	Section 27 of MSA 32 of 2000	07 October 2024	PMS Manager	
IGR, Planning and Research Standing Committee	Intergovernmental Framework 13 of 2005	10 October 2024	Manager IGR	
HR and Budget collate personnel request forms and analyse results and report to Directors	Municipal Finance Management Act, no 56 of 2003	10-30 October 2024	CFO Director Corporate Services	
Finalise 1st Quarter Performance Report for 2024/25 financial year	MFMA Circular 13	14 October 2024	PMS Manager	
IDP, Budget and PMS Steering Committee -to discuss Situational analysis	Section 55 of MSA 32 of 2000	14 October 2024	Municipal Manager	
Mayoral Committee	Institutional Calendar	17 October 2024	Executive Mayor	
IDP Representative Forum to present first Draft Situational Analysis Report	Section 16 of Local Government: Municipal Systems Act 32 of 2000	23 October 2024	Executive Mayor	
Conduct informal Quarter 1 Performance Evaluations with HOD's	MSA 39	24-25 October 2024	PMS Manager	
Ordinary Council Meeting	Section 16 of Municipal Systems Act 32 of 2000	29 October 2024	Executive Mayor	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Submission of D-Forms to NERSA	Section 43 of the MFMA 56 of 2003: Applicability of Tax and Tariff capping on Municipality	31 October 2024	CFO	
NOVEMBER 2024 Departmental Strategic Plans		04- 15 November 2024	Municipal Manager	
IDP, Budget and PMS Steering Committee/ MANCOM - Crafting and reviewal of Developmental Strategies and Objectives	Section 55 of MSA 32 of 2000	11 November 2024	Municipal Manager	
Discuss Draft Audit Report from AG for 2023/24 financial year	Section 46, 121, 126 of MFMA, 56 of 2003	15-29 November 2024	CFO	
Check with National & Provincial Governments and District Municipality for any information in relation to Budget and adjustment budget to project allocations for the next 3 years	Section 21, 36, 37 of MFMA	20-29 November 2024	CFO	
Technical IGR	Intergovernmental Relations Framework Act, no 13 of 2005	22 November 2024	IGR Manager	
IDP Representative Forum to present and discuss revised Developmental Strategies and Objectives.	Section 16 of Municipal Systems Act, 32 of 2000	26 November 2024	Executive Mayor	
Ordinary Council meeting.	Institutional Calendar	28 November 2024	Executive Mayor	
DECEMBER 2024				
O.R Tambo Representative Forum	Municipal Systems Act NO. 32 of 2000	06 December 2024	O.R Tambo Executive Mayor	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Political IGR Forum meeting	Intergovernmental Framework 13 of 2005 Relictions	10 December 2024	Manager IGR	
Ordinary Council meeting.	Institutional Calendar	12 December 2024	Executive Mayor	
O.R Tambo Council meeting	Institutional Calendar	13 December 2024	Executive Mayor	
Council Recess	Institutional Calendar	17 December 2024	Municipal Mayor	
JANUARY 2025				
Submission of Quarter 2 Performance Report and Mid-year Performance Report by Departments	MFMA Circular 13	08 January 2025	PMS Manager	
Management Retreat	Section 24 of the MSA, 32 of 2000	09 – 10 January 2025	PMS Manager	
IDP/ Budget PMS and Steering Committee to finalize Developmental Strategies and Objectives & proceed with Project Formulation	Section 55 of Municipal Systems Act, no 32 of 2000	13- 16 January 2025	Municipal Manager	
Obtain adjustments to projected allocations for the next 3 years, from National, Provincial & District Municipality	Section 21 of MFMA, 56 of 2003	16-23 January 2025	CFO	
Special Mayoral Committee	Institutional Calendar	17 January 2025	Executive Mayor	
Finalize 2023/24 Audited Annual Report incorporating financial and non-financial information on performance, audit reports and annual financial statements	MFMA 127 (2)	19 January 2025	PMS Manager	
APAC Meeting	Institutional Calendar	21 January 2025	CAE	
Ordinary Council Meeting (to consider Mid-year Budget and Performance Report 2024/25 and Draft Annual Report 2023/24	Section 53 of the MFMA 56 of 2003	29 January 2025	Speaker	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
O.R Tambo Council meeting Budget & SDBIP adjustment consultations process	Institutional Calendar Section 21 & 28 of MFMA, 56 of 2003	30 January 2025 30 January – 7 February 2025	O.R Tambo DM CFO	
FEBRUARY 2025				
Mayoral Lekgotla	Institutional calendar	03-04 February 2025	Municipal Manager/CFO/CO O	
MEGA Strategic Planning Session	Section 16 of Local Government: Municipal Systems Act, No.32 of 2000 read with Section 21 of the MFMA 56 of 2003: budget preparation process	05-07 February 2025	Municipal Manager/ COO CFO/	
Technical IGR	Intergovernmental Framework Relations Act, no 13 of 2005	11 February 2025	Manager IGR	
OR Tambo DM MayCo Lekgotla		12 -13 February 2025	OR Tambo DM Municipal Manager/ CFO	
Annual Report Hearings	Intergovernmental Relations Framework Act, no 13 of 2005	12-14 February 2025	Executive Mayor	
IDP, Budget and PMS Rep Forum to finalize Developmental Strategies and Objectives & proceed with Project Formulation.	Section 24 & 26 of the MSA 32 of 2000 read with section 21 & 53 of the MFMA 56 of 2003	14 February 2025	Executive Mayor	
OR Tambo DM Mega Strat Plan	Section 16 of Local Government: Municipal Systems Act, No.32 of 2000 read with Section 21 of the MFMA 56 of 2003: budget preparation process	18- 20 February 2025	OR Tambo DM Municipal Manager/ CFO	
Mid-Year Budget Engagement	Section 72 of the MFMA, 56 of 2003	19 February 2025	CFO	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Mayoral Committee to consider the adjustment Budget/IDP and SDBIP adjustment	Institutional Calendar	24 February 2025	Executive Mayor	
Draft SDBIP 2024/25 consultations	Institutional Calendar	26 February- 05 March 2025	PMS Manager	
Special council meeting to consider the adjustment budget and SDBIP adjustment	Section 72 & 21 of MFMA 56 of 2003 reads with Section 46 of the MSA 32 of 2000	27 February 2025	Speaker	
O.R Tambo Council meeting	Institutional Calendar	28 February 2025	Speaker	
MARCH 2025				
Draft MTREF 2024/25 consultations	Section 16 of MFMA, 56 of 2003	3-7 March 2025	CFO	
IDP/ PMS and Budget Executive Management/Steering Committee to discuss and present the first draft IDP and prepare for MEGA Strat Plan.	Section 55 of Municipal Systems Act, No.32 of 2000 read with Section 21 of the MFMA 56 OF 2003; budget preparation process	05 March 2025	Municipal Manager/ CFO/ Director: RED	
Approval of electricity tariffs by NERSA	Section 43 of MFMA, 56 of 2003	06 March 2025	CFO	
Ward Councillors Forum	Section 16 of the Municipal Systems Act, 32 of 2000	07 March 2025	Speaker	
MANCOM/ Steering Committee meeting	Institutional calendar	17 March 2025	Municipal Manager	
Mayoral Committee	Institutional Calendar	19 March 2025	EM	
O.R Tambo Representative Forum	Municipal Systems Act No. 32 of 2000	27 March 2025	O.R Tambo Executive Mayor	
Political IGR	Intergovernmental Relations Framework	27 March 2025	IGR Manager	
Council Considers Adoption of First Draft IDP, Budget & Annual Report and MTREF Budget and policies for 2025/26.	Section 25 & 30 of the MSA 32 of 2000 read with section 24 of the MFMA 56 of 2003	28 March 2025	Executive Mayor	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
MANCOM/Steering Committee Meeting	Institutional Calendar	31 March 2025	Municipal Manager	
APRIL 2025				
Review Budget related policies 2025/26	Section 21 of MFMA, 56 of 2003	2-4 April 2025	CFO	
Submission of approved Annual Report, AFS, Audit Report and Audit Action Plan to AG, Treasury and COGTA	Intergovernmental Relations Framework Act 13 of 2005	4 April 2025	PMS Manager	
Submission of approved Annual Report, AFS, Audit Report and Audit Action Plan to AG, Treasury and COGTA	Intergovernmental Relations Framework Act 13 of 2005	4 April 2025	PMS Manager	
Submission of quarter 3 Performance report by departments	Institutional Calendar	08 April 2025	PMS Manager	
OR Tambo DM IDP Roadshows for Community Consultation to solicit Public Comments on Draft IDP 2025/26	Section 17 [2] [c] of MSA 32 of 2000	08 – 16 April 2025	OR Tambo DM Executive Mayor	
IDP Roadshows for Community Consultation to solicit Public Comments on Draft IDP 2025/26	Section 17 [2] [c] of MSA 32 of 2000	09 April – 24 April 2025	Executive Mayor	
IDP/Budget & PMS advertised for Public Comments	Section 21A of MSA 32 of 2000 read with Section 22(a) of MFMA, Act 56 of 2003	11 April 2025	Manager Communications/ Budget Manager	
IDP/ Budget PMS and Steering Committee/MANCOM -to outline IDP Roadshows	Section 55 of MSA 32 of 2000	14 April 2025	Municipal Manager	
Ward Councillors Forum meeting to present IDP Itinerary for Roadshows.	Chapter 4 and 5 of the Municipal Systems Act 32 of 2000	16 April 2025	IDP Manager	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Budget Benchmarking	Chapter 4 of the Municipal Finance Management Act 56 of 2003.	17 April 2025	CFO/COO	
APAC Meeting	Institutional Calendar	23 April 2025	Municipal Manager	
OR Tambo Council Meeting	Institutional Calendar	25 April 2025	Municipal Manager	
Ordinary Council Meeting	Institutional Calendar	30 April 2025	Speaker	
Submission of Draft IDP to Internal Audit for Review		30 April 2025	Manager IDP	
MAY 2025				
IDP Steering Committee/MANCOM to discuss and consider Public Comments on Draft IDP, PMS 2025-26 and MTERF Budget review.	Section 24(1) of the Municipal Systems Act 32 of 2000 states that the Municipal Council must at least 30 days before the start of the budget year considers approval of the annual budget/IDP	05 May 2025	Municipal Manager/Executive Mayor	
IGR, Planning & Research Standing Committee.	Institutional Calendar	07 May 2025	COO	
Submission of Draft IDP/Budget and PMS to Internal Audit for Review	Section 55 of Municipal Systems Act, no 32 of 2000	09 May 2025	IDP Manager	
IDP Representative Forum to discuss and consider Public Comments on Draft IDP, Budget & PMS 2025/26	Section 24(1) the Municipal Council must at least 30 days before the start of the budget year consider approval of the annual budget	15 May 2025	Executive Mayor	
Mayoral Committee to consider Draft IDP and Budget 2025/26	Institutional Calendar	22 May 2025	Executive Mayor	
Special Council considers Adoption of Final Draft IDP 2025/26, and MTREF Budget.	Section 24(1) the Municipal Council must at least 30 days before the start of the budget year	28 May 2025	Speaker	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
	considers approval of the annual budget			
OR Tambo Council Meeting	Institutional Calendar	29 May 2025	Municipal Manager	
O.R Tambo Representative Forum	Municipal Systems Act No. 32 of 2000	29 May 2025	O.R Tambo Executive Mayor	
JUNE 2025				
MANCOM/Steering Committee Meeting.	Institutional Calendar	02 June 2025	Municipal Manager	
Technical IGR meeting	Intergovernmental Relations Framework 13 of 2005	03 June 2025	Manager IGR	
Facilitation for the advertisement of Adopted IDP/Budget and PMS Document.	Section 21 of the Municipal Systems Act No:32 of 2000 reads with Section 22 & 23 of the Municipal Finance Management Act 56 of 2003	05-09 June 2025	IDP Manager	
Finalization of Service Delivery and Budget Implementation Plan for 2025/26	Section 41 of Local Government: Municipal systems Act No 32 of 2000	06-12 June 2025	PMS Manager	
Submission of Adopted IDP/ Budget to all spheres of Government and O.R. Tambo DM.	Section 21 of the Municipal Systems Act No:32 of 2000 reads with Section 22 & 23 of the Municipal Finance Management Act 56 of 2003	09- 11 June 2025	IDP Manager	
Submit Draft SDBIP to Executive Mayor	Section 53 MFMA 56 of 2003	13 June 2025	Municipal Manager	
Political IGR meeting	Intergovernmental Relations Framework 13 of 2005	24 June 2025	Manager IGR	
Approval of SDBIP 2025/26	Section 53 of MFMA 56 of 2003	27 June 2025	Executive Mayor	
Submit approved SDBIP to Treasury, AG and COGTA		27 June 2025	PMS Manager CFO	

ACTIVITY	LEGISLATIVE REQUIREMENTS	ACTUAL DATE	RESPONSIBILITY	PROGRESS TO DATE
Draft 2024/25 performance agreements	MSA 57 (2) MFMA 69 (3) (b)	30 June 2025	PMS Manager	
Print and distribute final approved SDBIP for the 2024/25 financial year	MFMA Guidance	30 June 2025	PMS Manager	

6. OR TAMBO DM IDP, PMS & BUDGET SCHEDULE OF ACTIVITIES

Overview of this IDP Process time frame and alignment to District is illustrated in the cycle below. This cycle should be used as a guide through which the process can be better managed by municipalities. The form and content of the IDP document is however subject to the discretion of each municipality.

This will be used as an example and does not discourage other ideas from the municipalities. Each municipality should follow the prescribed IDP process: -


IDP Phases	Key Issues & Outcome	LM Timeframe	Expected DM Timeframe
PHASE 0 Preparation	What do we need to do to plan for the Municipality? Outcome: IDP Framework and process plan	End August 2024	End August 2024
PHASE 1 Analysis	What is the current status? Ward to Ward IDP & Budget Outreach Programme Outcome: Reviewed Status Quo Report and priority issues (IDP Rep. Forum)	17 September to -30 September 2024	Sept. 2024
		23 October 2024	Nov 2024
PHASE 2 Strategies	Where do we want to go and how do we get there? Outcome: reviewed objectives and strategies (IDP Rep. Forum)	26 November 2024	Nov 2024
PHASE 3 Projects	What actions do we have to undertake to realise these strategies? Outcome: Indicators and basic project implementation information (IDP Rep. Forum)	13 February 2025	February 2025

IDP Phases	Key Issues & Outcome	LM Timeframe	Expected DM Timeframe
	(MEGA Strategic Planning)	11-14 March 2025	March 2025
PHASE 4 Integration	What do we need to manage to make it happen? Outcome: Integrated management programmes and plans	Feb -Mar 2025	End March 2025
	Are we satisfied? Outcome: Tabling of First Draft IDP and Budget to Council	28 March 2025	End March 2025
	Are we satisfied? Public Comments	24 April – 09 May 2025	May 2025
PHASE 5 Approval	Outcome: Adoption of Final IDP and Budget by Council	28 May 2025	End May 2025
Implementation, monitoring, reporting and review			


**7. PROVINCIAL TREASURY BUDGET MID-YEAR ENGAGEMENT ASSESSMENT:
DRAFT SCHEDULE OF DATES**

No	PT - District Name	Municipality Name	2025 Mid-Year Engagement	Mid-Year Venue	2025 Benchmark Engagement	Benchmark Engagement Venue
1	OR Tambo District	King Sabata Dalindyebo Local Municipality	19 Feb 2025	Municipality Boardroom	17 April 2025	Municipality Boardroom
2		Nyandeni Local Municipality	19 Feb 2025	Municipality Boardroom	6 May 2025	Municipality Boardroom
3		Mhlontlo Local Municipality	14 Feb 2025	Municipality Boardroom	23 April 2025	Municipality Boardroom
4		Ngquza Hill Local Municipality	26 Feb 2025	Municipality Boardroom	16 April 2025	Municipality Boardroom
5		Port St Johns Local Municipality	26 Feb 2025	Municipality Boardroom	22 April 2025	Municipality Boardroom
6		O.R Tambo DM	Feb 2025	Municipality Boardroom	May 2025	Municipality Boardroom


MA MAMEKISO
IDP MANAGER
 Date _____


G. R TOBIA
CHIEF OPERATIONS OFFICER
 Date 31/7/2024


N. ZIBI
ACTING CHIEF FINANCIAL OFFICER
 Date 02/8/24


N. PAKADE:
MUNICIPAL MANAGER
 Date 07/08/2024