



**Zululand**  
District Municipality

# 2023-2024 INTEGRATED DEVELOPMENT PROCESS PLAN

---

[2022-2027 CYCLE]

Contact Person: RN Hlongwa

**Zululand** District Municipality

Tel.: 035-874 5500

Fax No.: 035-874 5589

[E-mail:kphungula@zululand.org.za](mailto:kphungula@zululand.org.za)

This document is compiled in terms of the Municipal Systems Act No 32 of 2000 which makes provision for a District Municipality to develop an integrated development framework for the area of the district as a whole

# Contents

1. INTRODUCTION .....	3
1.1 What is a Process Plan? .....	3
1.2 Integrated Development Plan Review Process .....	3
1.3 Legal Status .....	3
2. INSTITUTIONAL ARRANGEMENTS FOR THE IDP .....	3
2.1 Zululand District Municipality .....	3
2.1.1 Management Committee (MANCO) .....	3
2.2 Consultation Structures .....	4
2.2.1 Planning and Development Technical Forum .....	4
2.2.2 District Growth and Development Forum (Formerly IDP Representative Forum) .....	4
2.3 Roles and Responsibilities .....	5
2.3.1 The IDP Manager .....	5
3. PUBLIC PARTICIPATION .....	7
4. Process Programme .....	7
4.1 Preparation Phase .....	8
4.2 Physical Review .....	8
4.2.1 Situational Analysis .....	8
4.2.2 Development Strategies .....	8
4.2.3 Projects .....	9
4.2.4 Integration .....	9
4.2.5 Approval .....	9
4.3 Budget Review Process .....	10
4.4 Performance Management Review Process .....	10
4.5 Alignment of the Physical IDP, Budget and Performance Management Review Processes .....	11
7. Binding Provincial and National Plans, Planning Requirements and legislation .....	25
8. Activity and Resource Plan .....	25
9. ZDM IDP Review 2023/2024: Process Plan .....	27

# **1. INTRODUCTION**

## **1.1 What is a Process Plan?**

Municipal Systems Act No 32 of 2000, Reg (5)28: "Each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan."

The process must be reviewed annually before commencing the annual IDP Review Process.

## **1.2 Integrated Development Plan Review Process**

The Integrated Development Plan (IDP) Review Process is a vehicle through which Municipalities prepare strategic development plans called Integrated Development Plans for a five-year period. Because service delivery is progressive in nature, the IDP must be reviewed annually to keep up with the evolving nature of communities.

The Zululand District Municipality will embark on its first IDP of the 5 Year cycle of IDPs which commences from 2017 – 2022.

## **1.3 Legal Status**

The IDP is a legislative requirement, has a legal status and therefore supersedes all other plans that guide development at local government level.

# **2. INSTITUTIONAL ARRANGEMENTS FOR THE IDP**

## **2.1 Zululand District Municipality**

### **2.1.1 Management Committee (MANCO)**

The Management Committee is a technical working team of Section 57 Managers who give guidance and monitor the planning review process.

Chaired by the Municipal Manager the responsibilities of the committee include;

- Provide Terms of Reference for various sub-committees
- Commission research studies
- Consider and comment on input from sub-committees
- Consider and comment on input from Provincial and National Sector Departments e.g. IDP Hearing Assessments, MEC Letter on the IDP
- Process and summaries and draft outputs
- Make recommendations
- Prepare and or facilitate meetings

Management Committee meetings take place every Monday.

## **2.2 Consultation Structures**

### **2.2.1 Planning and Development Technical Forum**

Chaired by the district this forum is the key alignment structure between municipalities and other relevant stakeholders. The forum enables the district to play a co-ordinatory role in the planning and implementation processes between the district stakeholders to limit duplication, conflict and promote sharing of resources and best practices.

The terms of reference of the District Planners Forum are as follows:

- support the IDP Manager in preparing for the IDP review and throughout its process;
- provide terms of reference for specific planning activities
- commission research studies
- consider and comment on inputs from any sub-committees, study teams, consultants, provincial sector departments, or service providers
- make content recommendations
- process, summarize and document outputs
- prepare, facilitate and document meetings.
- consider Development Planning Shared Services matters
- consider Planning and Development Act ramifications
- configure spatial information and strategies on Geographical Information Systems

### **2.2.2 District Growth and Development Forum (Formerly IDP Representative Forum)**

The Growth and Development Forum is the main institutional mechanism for consultation in the IDP process.

While establishing a strategic direction, the forum prepares the foundation for continuous alignment and integration by means of a joint planning dialogue between all development stakeholders in the district. Key issues include factors inhibiting economic growth in all sectors.

Further, the summit forges a link with all IDPs by setting the theme for critical issues that will be dealt with in the Review process.

Another key objective for the forum to fulfil is to approve the final Zululand District Municipality IDP.

Composition includes:

- Executive Councils of the District and Local Municipalities
- Municipal Section 57 and 56 Managers
- Provincial and National Sector Department Managers
- Traditional Councils
- Resource Persons
- Community Representatives
- Other stakeholders as identified, and which responded to advertisements

Terms of reference for the forum are as follows:

- represent the interests of the community

- provide an organizational mechanism for discussion, negotiation, and decision-making between the stakeholders, including municipal government
- ensure communication between all stakeholder representatives
- monitor the performance of the planning and implementation process.

Each municipality (DM and LMs) will need to decide on the actual composition of its IDP Representative Forum and to specify how these institutional arrangements have been, or are to be, set up.

### 2.2.3 Council Structures

STRUCTURE	PURPOSE	CHAIR	PROPOSED DATE
Planning and GIS Portfolio Committee	Monitoring of IDP progress, participation of ZDM councilors in IDP development/review, recommendation of IDP to EXCO, Rep Forum	ZDM	16 August 2022

## 2.3 Roles and Responsibilities

### 2.3.1 The IDP Manager

The IDP Manager is an official of the municipality assigned the responsibility of championing the IDP process. Amongst other, the following responsibilities have been allocated to the IDP Manager for the IDP Review Process:

- To ensure that the Process Plan is finalized and adopted by Council;
- To adjust the IDP according to the proposals of the MEC;
- To identify additional role-players to sit on the ZDM Representative Forum, Planning Forum and Steering Committee;
- To monitor the participation of role players;
- To ensure appropriate procedures are followed;
- To ensure documentation is prepared properly;
- To carry out the day-to-day management of the IDP process;
- To respond to comments and enquiries;
- To ensure alignment of the IDP with other IDP's within the Zululand District Municipality;
- To co-ordinate the preparation of the Sector

Plans/operational plans and their inclusion into the IDP documentation;  
To submit the reviewed IDP to the relevant authorities

Other roles and responsibilities are as follows:

Role Player	Roles and Responsibilities
Council	<ul style="list-style-type: none"> <li>❖ Manage drafting of the IDP</li> <li>❖ Assign responsibilities to the Municipal Manager</li> <li>❖ Adoption of IDP</li> </ul>
Councillors	<ul style="list-style-type: none"> <li>❖ Linking the IDP process with their constituencies</li> <li>❖ Organising the public participation</li> <li>❖ Recommend IDP to council for adoption</li> </ul>
Mayor	<ul style="list-style-type: none"> <li>❖ Decide on the process plan.</li> <li>❖ Responsible for the overall management, coordination and monitoring of the process and drafting of the IDP Review documentation, or delegate this function.</li> </ul>
Municipal Officials	<ul style="list-style-type: none"> <li>❖ Provide technical/sector expertise.</li> <li>❖ Prepare selected Sector Plans.</li> <li>❖ Prepare draft progress proposals.</li> </ul>
Municipal Manager	<ul style="list-style-type: none"> <li>❖ Decide on planning process.</li> <li>❖ Monitor process.</li> <li>❖ Overall Management and co-ordination.</li> </ul>
Management Committee	<ul style="list-style-type: none"> <li>❖ Information "GAP" identification.</li> <li>❖ Oversee the alignment of the planning process internally with those of the local municipality areas.</li> <li>❖ Co-ordinate, identify and prioritise plans.</li> <li>❖ Make recommendation to the executive committee.</li> </ul>
Planning and Development Forum	<ul style="list-style-type: none"> <li>❖ Determine actions to be taken in the review process.</li> <li>❖ Commission sub-committees for identified action.</li> <li>❖ Provide guidance to the IDP Planning Forum.</li> </ul>

Role Player	Roles and Responsibilities
Planning Professionals	<ul style="list-style-type: none"> <li>❖ Methodological guidance.</li> <li>❖ Facilitation of planning workshops.</li> <li>❖ Support with guidance on Sector Plans (sources of funding and guidelines).</li> <li>❖ Documentation.</li> </ul>
The District Municipality	<ul style="list-style-type: none"> <li>❖ Coordination roles for local municipalities.</li> <li>❖ Ensuring horizontal alignment of the IDP's of the municipalities in the district council area.</li> <li>❖ Ensuring vertical alignment between the district and local planning.</li> <li>❖ Facilitation of vertical alignment of IDP's with other spheres of government and sector departments.</li> <li>❖ Provide events for joint strategy workshops with local municipalities, provincial and national role players and other subject matter specialists.</li> </ul>
ZDM Growth and Development Forum	<ul style="list-style-type: none"> <li>❖ Representing stakeholder interest and contributing knowledge and ideas.</li> </ul>

Role Player	Roles and Responsibilities
Government Departments	<ul style="list-style-type: none"> <li>❖ Provide data and information.</li> <li>❖ Budget guidelines.</li> <li>❖ Alignment of budgets with the IDP.</li> <li>❖ Provide professional and technical support.</li> </ul>
Consultants	<ul style="list-style-type: none"> <li>❖ Providing the required specialist services for various planning activities as and when needed.</li> </ul>

### 3. PUBLIC PARTICIPATION

The table below indicates the proposed stakeholder participation mechanisms according to the different phases of the IDP.

Phase	Participation Mechanism
Analysis	Growth and Development Forum Community and ward committee meetings Stakeholder Meetings Sample surveys IDP Representative Forum
Strategies	District Strategic Workshop IDP Roadshows and Public Meetings
Projects	Planning and Development Forum Technical Subcommittees
Integration	ZDM Growth and Development Forum
Approval	Community and stakeholders analysis IDP Representative Forum
Annual Implementation	Growth and Development Forum

### 4. Process Programme

#### Preparation for the 2019/2020 IDP Process

The proposed IDP process is staggered into 3 parts;

- Preparation Phase
- Physical Review
- Approval

There are processes that take place in parallel to the IDP Processes above and are a crucial supplier of information to the Integrated Development Plans as follows:

- Budget Review Process
- Water Service Development Plan Review
- Performance Management Review Process
- Spatial Development Framework

#### 4.1 Preparation Phase

This phase comprises of drafting the IDP Framework and individual IDP Process Plans by the Zululand District Family of Municipalities. The proposed period completion date is **August 2022**.

#### 4.2 Physical Review

This stage comprises of five phases namely:

Phase/Activity	Proposed Completion Timeframe
Situational Analysis	30 Sept 2022
Development Strategies	30 Nov 2022
Projects	15 Dec 2022
Integration	28 February 2023
Draft Approval	30 March 2023
Final Approval	30 May 2023

##### 4.2.1 Situational Analysis

During this period, IDP Managers and Planners will liaise with stakeholders in their area of jurisdiction in verifying the situational analysis of each sector. The output of this phase is a **District Wide Situational Analysis Report** which shall inform Municipal Councils and Management on developing relevant strategies (next phase of IDP Review). The Planning and Development Forum will co-ordinate monitor and consolidate the information into a single report.

##### 4.2.2 Development Strategies

Two approaches can be followed.





It is anticipated that individual municipalities will each hold their own strategic sessions. However in order to facilitate alignment between all municipalities in Zululand, it is imperative that the IGR structures Municipal Managers Forum and Mayors Forum are initiated to align politically and administratively all identified strategies.

The benefit of this option is that there is district wide consensus on a long term strategic framework which can be monitored. It also offers an opportunity for high level district political intervention in terms of fast-tracking strategic programmes and or projects in each of the municipalities' thereby improving the lives of communities.

#### 4.2.3 Projects

Once developed, the district and local long term strategic plans must be translated into implementable projects.

Projects identified at ward committee meetings by the community will be combined with newly identified projects by the IDP Managers. The Planning and Development Forum will investigate the development of a district wide project prioritisation model which will assist in prioritizing unfunded projects for implementation either individually or jointly between municipalities. The Planning and Development Forum will also reconcile and group projects to package Regional Projects.

It is also possible that Sector Departments will be invited to participate in project planning.

#### 4.2.4 Integration

This phase may be combined with the Project Planning phase above in order to ensure that there is consensus on projects that will be implemented in the municipalities.

Sectoral integration is also crucial through Sector Plans.

Existing and new projects will be monitored by the Planning and Development Forum.

#### 4.2.5 Approval

Approval includes Municipal approval alone as well as Municipal plus Sector Department Approval.

#### Draft Approval (Municipalities alone)

Municipalities submit draft IDP to the MEC by early **April 2022**.

#### Final Approval (Municipalities plus Sector Departments)

The IDP Representative Forum will approve the final Integrated Development Plan by **early May 2023** effectively recommending the document to the Executive Council. **It is proposed that the Local Municipality Representative Fora approve their documents before or in parallel to that of the District.**

All Municipalities must adopt the final IDP document by **30 May 2023** for timeous submission to the MEC by **June 2023**.

#### IDP and Performance Management Checklist

In order to ensure that documents submitted to any structure for consideration and or adoption, a checklist has been developed. The checklist will ensure that any document that is adopted contains the most relevant and updated information. The nature of the information identified is constantly changing every year and can easily be overlooked when submitting a reviewed document. This is particularly important for alignment and of updated strategies and ensuring that adequate consultation in terms of information appearing in the IDP has taken place.

### **4.3 Budget Review Process**

The budget process is critical in lending implementability to the Integrated Development Plan. It is linked with the physical IDP Review where performance measures are developed. Projects are identified, prioritized and a budget allocated for implementation.

All identified capital projects must be identified and submitted to the Chief Financial Officer by **15 December 2022** in order to inform the budget.

### **4.4 Performance Management Review Process**

This is an on-going mechanism that enables the municipality to measure its ability to deliver on targeted service delivery goals. It is closely linked with the physical IDP Review through the development strategies and project identification phase which form the basis for development of key performance measures. It is also linked with Budget phase where a budget is allocated to implement the identified strategies and projects.

Reviews take place on a quarterly basis in line with the Monitoring and Review.

#### 4.5 Alignment of the Physical IDP, Budget and Performance Management Review Processes

The table below reflects the alignment of the IDP Review, the Budget Review and the Performance Management Review Processes, bearing in mind that these need to be seamlessly linked and aligned:

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
JULY 2022	<ul style="list-style-type: none"> <li>Prepare draft Framework Plan</li> <li>Prepare draft Process Plan</li> </ul>	<ul style="list-style-type: none"> <li>Signing of new performance contracts for Section 57 Managers and submission to EXCO (Section 69 of the MFMA and Section 57 of the MSA).</li> <li>Prepare Departmental Business Plans for the next financial year.</li> <li>Previous year S57 Managers' Performance Assessments</li> <li>Adoption of SDBIP</li> </ul>	<ul style="list-style-type: none"> <li>Mayor begins planning for next three-year budget in accordance with co-ordination role of budget process</li> <li><b>MFMA s 53</b></li> <li>Planning includes review of the previous years budget process and completion of the Budget Evaluation Checklist</li> <li>Formation of budget Steering Committee (Section 4, subsection 1)</li> <li>Mayor establishes committees and consultation forums for the budget process</li> </ul>	<ul style="list-style-type: none"> <li>MM &amp; HOD's of municipality begin planning for next three-year budget. MFMA Budget Project Team (IDP/Budget Task Team) commences and reviews past budget/IDP process.</li> <li><b>MFMA s 68, 77</b></li> <li>MM &amp; HOD's of municipality review options and contracts for service delivery</li> <li><b>MSA s 76-81</b></li> </ul>	<ul style="list-style-type: none"> <li>Approve and announce new budget schedule and set up committees and forums.</li> <li>Consultation on performance and changing needs.</li> </ul>
AUGUST 2022	<ul style="list-style-type: none"> <li>Commence review of Situational Analysis (i.e. backlogs)</li> <li>Review national and provincial sector strategic plans</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report (for last quarter of previous year) MPPR Reg. 14</li> <li>Quarterly Audit Committee meeting (for the last quarter of previous year) MFMA Sect 166 &amp; MPPR Reg. 14(3)(a)</li> <li>Special Audit Committee meeting (for evaluation of Sect 57 Managers final assessments) MPPR Reg. 14(3)(b)</li> </ul>	<ul style="list-style-type: none"> <li>Mayor tables in Council a time schedule outlining key deadlines for: preparing, tabling and approving the budget; reviewing the IDP (as per s 34 of MSA) and budget related policies and consultation processes at least 10 months before the start of the budget year.</li> <li><b>MFMA s 21,22, 23;</b></li> <li><b>MSA s 34, Ch 4 as amended</b></li> </ul>	<ul style="list-style-type: none"> <li>MM to give notice to the community of the process to be followed (advertise)</li> <li><b>MSA s28(3)</b></li> <li>Budget Task Team meeting</li> </ul>	<ul style="list-style-type: none"> <li>Consultation on performance and changing needs.</li> <li>Review performance and financial position.</li> <li>Review external mechanisms.</li> <li>Start Planning for next three years.</li> </ul>

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
		<ul style="list-style-type: none"> <li>Draft Annual Report 16/17</li> </ul>			
SEPTEMBER 2022	<ul style="list-style-type: none"> <li>Confirm Development Strategies and prioritise of council and determine budget parametres</li> </ul>		<ul style="list-style-type: none"> <li>Council through the IDP review process determines strategic objectives for service delivery and development for next three-year budgets including review of provincial and national government sector and strategic plans</li> <li>Budget Steering Committee</li> </ul>	<ul style="list-style-type: none"> <li>CFO, Asst. CFO Budget &amp; Income of municipality determine revenue projections and proposed rate and service charges and drafts initial allocations to functions and departments for the next financial year after taking into account strategic objectives</li> <li>Engages with Provincial and National sector departments on sector specific programmes for alignment with municipalities plans.</li> </ul>	<ul style="list-style-type: none"> <li>Update policies, priorities and objectives.</li> <li>Determine revenue projections and policies.</li> </ul>
OCTOBER 2022	<ul style="list-style-type: none"> <li>Identify projects/project proposals</li> <li>Prepare Departmental Operational Plans linked to strategic priorities</li> </ul>	<ul style="list-style-type: none"> <li>Auditor General audit of performance measures Appointment of Internal Auditors (MFMA Sect 55(2))</li> <li>Sect 57 Managers' quarterly assessments (for first quarter)</li> <li>Commence with preparation of Annual Report</li> </ul>	<ul style="list-style-type: none"> <li>Review of Service Delivery &amp; Budget Implementation Plan</li> </ul>	<ul style="list-style-type: none"> <li>MM does initial review of national policies and budget plans and potential price increases of bulk resources with function and department officials</li> <li><b>MFMA s 35, 36, 42; MTBPS</b></li> </ul>	<ul style="list-style-type: none"> <li>Determine revenue projections and policies.</li> <li>Engagement with sector departments, share and evaluate plans, national policies, MTBPS.</li> <li>Draft initial allocations to functions.</li> <li>Obtaining MTBPS (Medium Term Budget Policy Statement) - National Treasury</li> </ul>
NOVEMBER 2022	<ul style="list-style-type: none"> <li>Commence with Community and stakeholder consultation process (IDP Roadshows, ward consultations)</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report (for first quarter) MPPR Reg. 14</li> <li>Quarterly Audit Committee meeting (for the first quarter) MFMA Sect 166 &amp; MPPR Reg. 14(3)(a)</li> </ul>		<ul style="list-style-type: none"> <li>MM reviews and drafts initial changes to IDP</li> <li><b>MSA s 34</b></li> <li>Auditor-General to return audit report [Due by 30 November, <b>MFMA 126(4)</b>]</li> <li>Budget section commences the process of Adjustment Budget, liaises with departments.</li> </ul>	<ul style="list-style-type: none"> <li>Draft initial changes to IDP.</li> <li>Consolidation of budgets and plans.</li> <li>Executive determines strategic choices for next three years.</li> <li>Submit draft operational budget computations to CFO</li> <li>Review past MTEF and Draft 3 year budget</li> <li>AG to complete audit within 3 months of receiving financial statements</li> <li>Review of tariff structure</li> </ul>

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
					<ul style="list-style-type: none"> <li>IDP and Budget Roadshows</li> </ul>
<b>DECEMBER 2022</b>	<ul style="list-style-type: none"> <li>Finalise first draft of Departmental Operational Plans</li> </ul>	<ul style="list-style-type: none"> <li>Finalise first draft of annual report (MFMA Sect 121)</li> </ul>	<ul style="list-style-type: none"> <li>Council finalises tariff (rates and service charges) policies for next financial year</li> <li><b>MSA s 74, 75</b></li> <li>Budget SC</li> </ul>	<ul style="list-style-type: none"> <li>MM &amp; HOD's consolidate and prepare proposed budget and plans for next financial year taking into account previous years performance as per audited financial statements</li> </ul>	<ul style="list-style-type: none"> <li>Review past MTEF and Draft 3 year budget</li> <li>Council finalises tariff (service charges) policies for next financial year</li> </ul>
<b>JANUARY 2023</b>	<ul style="list-style-type: none"> <li>MM reviews and drafts initial changes to IDP</li> </ul>	<ul style="list-style-type: none"> <li>Annual Customer Satisfaction survey (to be consolidated to annual report) MSA Sect 40</li> <li>Mayor tables annual report MFMA Sect 127(2)</li> <li>Make public annual report and invite community inputs into report (MFMA Sect 127 &amp; MSA Sect 21a)</li> <li>Sect 57 Managers' quarterly assessments (for second quarter)</li> <li>Approve Annual Report</li> </ul>	<ul style="list-style-type: none"> <li>Review of Mid-Year Budget &amp; Performance Assessment.</li> <li><b>MFMA 8 Section 72</b></li> </ul>	<ul style="list-style-type: none"> <li>MM prepares Mid Year budget review and performance assessment MFMA 8 Section 72</li> <li>MM reviews proposed national and provincial allocations to municipality for incorporation into the draft budget for tabling. (Proposed national and provincial allocations for three years must be available by 20 January)</li> <li><b>MFMA s 36</b></li> <li>Submit a report of the mid year budget and performance assessment to NT and PT.</li> <li><b>MFMA 8 Section 72(1)b</b></li> </ul>	<ul style="list-style-type: none"> <li>Prepare detailed budgets and plans for the next three years.</li> <li>FSPC - Review of mid year budget and annual report.</li> <li>EXCO - Approval of mid year budget and annual report.</li> <li>Mayor to table Adjustment Budget</li> <li>Review of Mid-Year Budget &amp; Performance Assessment.</li> <li>Mayor to table annual report to Council. Contents of report in accordance with Sect. 127 (3)</li> <li>MM reviews proposed national and provincial allocations to municipality for incorporation into the draft budget for tabling.</li> <li>Submit a report of the mid year budget and performance assessment to NT and PT.</li> <li>Departmental Managers Review and Approve provisional 3 year budget</li> </ul>
<b>FEBRUARY 2023</b>			<ul style="list-style-type: none"> <li>Budget steering committee</li> <li>Tabling of the adjustment budget</li> </ul>	<ul style="list-style-type: none"> <li>Municipality engages Provincial KZN Treasury regarding Mid-Year Budget Performance Assessment.</li> <li>Prepare the adjustment budget documents MFMA section 28.</li> </ul>	<ul style="list-style-type: none"> <li>Identify adjustment budget issues and parameters for discussion with Treasury</li> <li>Report to NT and PT the adjustment budget document and data string.</li> </ul>

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
	<ul style="list-style-type: none"> <li>Finalise draft budget incorporating draft budget, WSDP, PMS and other sector plans</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report (for second quarter) MPPR Reg. 14</li> <li>Quarterly Audit Committee meeting (for the second quarter) MFMA Sect 166 &amp; MPPR Reg. 14(3)(a)</li> <li>Submit annual report to AG, Provincial &amp; DTLGA (MFMA Sect 127)</li> </ul>		<ul style="list-style-type: none"> <li>MM finalises and submits to Mayor proposed budgets and plans for next three-year budgets taking into account the recent mid-year review and any corrective measures proposed as part of the oversight report for the previous years audited financial statements and annual report</li> <li>MM to notify relevant municipalities of projected allocations for next three budget years 120 days prior to start of budget year</li> <li><b>MFMA s 37(2)</b></li> </ul>	<ul style="list-style-type: none"> <li>Prepare detailed budgets and plans for the next three years.</li> <li>Executive adopts budget and plans and changes to IDP.</li> <li>Review Draft Budget for next financial year</li> <li>Consultation with local municipalities</li> <li>Mayor to table annual report to Council. Contents of report in accordance with Sect 127 (3)</li> <li>Gazetting of DORA allocations (Final) and incorporation within Draft Budget</li> <li>Draft budget for MANCO &amp; Finance Portfolio, including draft policies, tariffs</li> </ul>
<b>MARCH 2023</b>	<ul style="list-style-type: none"> <li>Table draft budget to Council by 28 March</li> </ul>	<ul style="list-style-type: none"> <li>Council to consider and adopt an oversight report [Due by 31 March <b>MFMA Sec 129(1)</b>]</li> <li>Set performance objectives for revenue for each budget vote (MFMA Sect 17)</li> </ul>	<ul style="list-style-type: none"> <li>Budget steering committee</li> <li>Mayor tables municipality budget, budgets of entities, resolutions, plans, and proposed revisions to IDP at least 90 days before start of budget year</li> <li><b>MFMA s 16, 22, 23, 87; MSA s 34</b></li> </ul>	<ul style="list-style-type: none"> <li>Municipality engages Provincial KZN Treasury regarding Adjustment budget assessment.</li> <li>MM reviews any changes in prices for bulk resources as communicated by 15 March</li> <li><b>MFMA s 42</b></li> <li>District draft IDP to Finance Portfolio, EXCO and Council</li> <li></li> </ul>	<ul style="list-style-type: none"> <li>Manco - final draft budget for next year</li> <li>MM reviews any changes in prices for bulk resources as communicated by the 15th of March</li> <li>Review of final draft budget / IDP to Finance Portfolio</li> <li>Council to adopt an oversight report containing the councils comments on the annual report</li> <li>Approval of final draft Budget &amp; IDP by Council - Mayor must table annual budget 90 days before start of budget year</li> <li>Acc Officer to Publish draft budget for comments/invite</li> </ul>

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
					communities for comments. <ul style="list-style-type: none"> <li>Draft Tabled Budget submission to National Treasury &amp; Provincial Gvt</li> </ul>
APRIL 2023	<ul style="list-style-type: none"> <li>IDP Hearing Assessments (1-4 April)</li> </ul>	<ul style="list-style-type: none"> <li>Refinement of Municipal Strategies, Objectives, KPA's, KPI's and targets and inclusion into IDP Review report.</li> <li>S57 Managers' Quarterly Performance Assessments</li> <li>Publicise Annual Report [Due by 7 April <b>MFMA Sec 129(3)</b>]</li> <li>Submit Annual Report to Provincial Legislature/MEC Local Government [Due by 7 April <b>MFMA Sec 132(2)</b>]</li> </ul>	<ul style="list-style-type: none"> <li>Public hearings on the budget, and council debate. Council consider views of the local community, NT, PT, other provincial and national organs of state and municipalities. Mayor to be provided with an opportunity to respond to submissions during consultation and table amendments for council consideration.</li> <li><b>MFMA s 23</b></li> <li>Consultation with national and provincial treasuries and finalise sector plans for water, sanitation, electricity etc</li> <li><b>MFMA s 21</b></li> </ul>	<ul style="list-style-type: none"> <li>MM publishes tabled budget, plans, and proposed revisions to IDP, invites local community comment and submits to NT, PT and others as prescribed</li> <li><b>MFMA s 22 &amp; 37; MSA Ch 4 as amended</b></li> <li>MM assists the Mayor in revising budget documentation in accordance with consultative processes and taking into account the results from the third quarterly review of the current year</li> <li>Municipality engages Provincial KZN Treasury regarding tabled budget assessment.</li> </ul>	<ul style="list-style-type: none"> <li>Consultation with National and Provincial Treasuries and finalise sector plans, water and sanitation, electricity, etc.</li> <li>Public hearings on the Budget, Council Debate on Budget and Plans.</li> <li>Revision of budget and IDP after input from National Treasury, Provincial, other Municipalities and public have been received.</li> </ul>
MAY 2023	<ul style="list-style-type: none"> <li>Table Final IDP to IDP Rep Forum</li> <li>Table Final IDP to council for adoption by 30 May</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly Project Implementation Report (for third quarter) MPPR Reg. 14</li> <li>Quarterly Audit Committee meeting (for third quarter) MFMA Sect 166 &amp; MPPR Reg. 14(3)(a)</li> <li>Annual review of organisational KPIs (MPPR Reg 11)</li> <li>Review annual organisational performance targets (MPPR Reg 11)</li> </ul>	<ul style="list-style-type: none"> <li>Budget steering committee</li> <li>Council to consider approval of budget and plans at least 30 days before start of budget year.</li> <li><b>MFMA s 24; MSA Ch 4 as amended</b></li> <li>Council must approve annual budget by resolution, setting taxes and tariffs, approving changes to IDP and budget related policies, approving measurable performance objectives for revenue by source and expenditure by</li> </ul>	<ul style="list-style-type: none"> <li>MM assists the Mayor in preparing the final budget documentation for consideration for approval at least 30 days before the start of the budget year taking into account consultative processes and any other new information of a material nature</li> <li>District draft IDP to Finance Portfolio, EXCO and Council</li> </ul>	<ul style="list-style-type: none"> <li>Public hearings on the Budget, Council Debate on Budget and Plans.</li> <li>Council adopts budget, resolutions, capital implementation plans, objectives and changes in IDP.</li> <li>Revised budget and IDP tabled to Financial Portfolio</li> <li>Final approval of Budget &amp; IDP by Council - Council to consider approval of budget and plans (at least 30 days before start of budget year)</li> </ul>

MONTH	ACTIVITIES				
	IDP	PMS	BUDGET		
			Mayor and Council	Administration - Municipality	Budget Review Activities
			vote before start of budget year • <b>MFMA s 16, 24, 26, 53</b>		
<b>JUNE 2023</b>	<ul style="list-style-type: none"> <li>Submission to COGTA / MEC</li> <li>Publish adopted budget and IDP and place multi-year budget and related documents on website</li> <li>Notice of IDP on website to all Service Providers and LM's</li> </ul>	<ul style="list-style-type: none"> <li>Community input into organisation KPIs and targets</li> <li>Submit Draft Performance Contracts to Mayor</li> </ul>	<ul style="list-style-type: none"> <li>Mayor must approve SDBIP within 28 days after approval of the budget and ensure that annual performance contracts are concluded in accordance with s 57(2) of the MSA. Mayor to ensure that the annual performance agreements are linked to the measurable performance objectives approved with the budget and SDBIP. The mayor submits the approved SDBIP and performance agreements to council, MEC for local government and makes public within 14 days after approval.</li> <li><b>MFMA s 53; MSA s 38-45, 57(2)</b></li> <li>Council must finalise a system of delegations.</li> <li><b>MFMA s 59, 79, 82; MSA s 59-65</b></li> </ul>	<ul style="list-style-type: none"> <li>MM submits to the mayor no later than 14 days after approval of the budget a draft of the SDBIP and annual performance agreements required by s 57(1)(b) of the MSA.</li> <li><b>MFMA s 69; MSA s 57</b></li> <li>MM of municipality publishes adopted budget and plans and places Multi-Year Budget and budget related documents on website and submits budget/IDP to national and provincial treasury.</li> <li><b>MFMA s 75, 87</b></li> </ul>	<ul style="list-style-type: none"> <li>Publish budget and tariffs (supplement)</li> <li>Finalise performance contracts and delegation.</li> <li>Draft SDBIP to Mayor (14 days after approval of budget)</li> <li>SDBIP approval by Mayor - 28 day deadline after approval of the budget</li> </ul>
<b>JULY 2023</b>	<ul style="list-style-type: none"> <li>Municipalities submit adopted IDPs by 30 June</li> <li>Draft IDP Review Process and Framework Plan for 2020/21 by 30 July.</li> </ul>		<ul style="list-style-type: none"> <li>The mayor submits the approved SDBIP and performance agreements to council, MEC for local government and makes public within 14 days after approval.</li> <li><b>MFMA s 53; MSA s 38-45, 57(2)</b></li> </ul>	<ul style="list-style-type: none"> <li>MM makes public projections of revenue and expenses for each month of the coming year, service delivery targets for each quarter, and performance agreements, 14 days after SDBIP is approved.</li> <li><b>MFMA s 53</b></li> </ul>	<ul style="list-style-type: none"> <li>Approved SDBIP and performance agreements to council, MEC for local government (publish within 14 days after approval)</li> </ul>



## Municipal Planning officials, Provincial and National Departments stakeholder consultation

<b>ZDM Consultation and Alignment Meetings</b>	
<b>ZDM Roadshows: Draft IDP, Budget and LED 2022/2023</b>	
<b>Municipality Visited</b>	<b>Date</b>
uPhongolo	To be determined
eDumbe	To be determined
Abaqulusi	To be determined
Ulundi	To be determined
Nongoma	To be determined
<b>ZDM Roadshows: Draft IDP, Budget and LED 2022/2023</b>	
<b>Municipality Visited</b>	<b>Date</b>
uPhongolo	To be determined
eDumbe	To be determined
Abaqulusi	To be determined
Ulundi	To be determined
Nongoma	To be determined
<b>Planning and Development Technical Forum (bi-monthly)</b>	<b>Date</b>
	July 2022
	Sept 2022
	Nov 2022
	Jan 2023
	March 2023
	June 2023
<b>District IDP Representative Forum</b>	<b>Date</b>
	To be determined
<b>Planning Services Portfolio Committee</b>	<b>Date</b>
	16 August 2022
<b>EXCO</b>	<b>Date</b>
	23 August 2022

ZDM Consultation and Alignment Meetings	
Council	Date
	25 August 2022

#### 4.6 Capacity And Cost to develop the Integrated Development Plan

The Zululand District Municipality is partially outsourcing the IDP. It is anticipated that the skills transfer (included in the contract) will leave the municipality in an improved position to consider reviewing and or developing its own IDP in the near future.

A budget between 400,000 will be made available for review of the IDP (including printing of copies for Council and submission to COGTA).

### 5. Focus Areas of the 2023/24 IDP

It is re-iterated that this is a new 5 year IDP that will be developed. Therefore all content in the IDP is subject to review to ensure an appropriate development trajectory for the next cycle.

#### 5.1 Demographics

Census 2011 data will be fully incorporated into the IDP document to justify existing and newly identified key issues. Key challenges and SWOT analysis will be revised.

#### 5.2 Development Strategies

Based on the previous year's financial and non-financial performance, service delivery backlogs and identified key issues, the development strategies will be revised to talk to the current situation.

#### 5.3 Sector Plans

The following sector plans are scheduled for incorporation into the IDP:

1. Integrated Electrification Plan
2. Comprehensive Institutional Diagnostic Assessment
3. Water Services Development Plan
4. Review feasibility of Regional Solid Waste Management landfill
5. Comprehensive Infrastructure Plan
6. Integrated Waste Management Plan

#### 5.4 Policies and bylaws

Policies and bylaws will be reviewed in the later half of 2023 on a date to be announced by MANCO.

#### 5.5 Financial Plan and Budget

The Financial Plan and budget are revised annually in terms of the MFMA. A decision will be taken whether to review the following;

1. Subsistence and Traveling policy
2. Credit control policy
3. Tariff policy
4. Investment and cash management policy
5. Insurance policy
6. Supply chain management policy
7. Asset management policy
8. Risk management policy
9. IT Disaster Recovery Plan
10. Fraud Prevention Strategies
11. Indigent Roster

## **5.6 Risk Management Plan**

The municipality reviews its risk management plan every year to address matters that are a risk to the municipality so as to ensure that negative consequences are mitigated or avoided. The action plan is addressed during Management Committee Meetings every Monday.

## **5.7 Key Performance Measures**

These include Key Performance Areas (Key Objectives, Objectives, Strategies, Indicators and targets). All these are reviewed annually in line with the development strategies to monitor implementation thereof.

## 5.8 Action Plan in the review of the IDP

PHASE 1: ANALYSIS								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?
						LMs	Sector Departments	
Phase 1: Analysis	Key Development Priorities	Planning and Development Forum	To review the following sectors of the Situational Analysis;					
			Municipal Institutional Governance	Municipal organograms, Internal structures, alignment structures, internal/external communication	COGTA Governance Unit, LMs	MM, Managers, HR PMS Manager, IDP Manager	COGTA Governance Unit Manager(s)	30 Sep 22
			Social and Community Development Analysis	gender, youth, sports, disabled, literacy levels, HIV/AIDS, poverty,	Social Development, Education, Arts and Culture, Health, Sports and Recreation, Premier, LMs	Community Services Managers, Office of the Mayor, IDP Manager	Relevant Departmental Managers	30 Sep 22

PHASE 1: ANALYSIS								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?
						<b>LMs</b>	<b>Sector Departments</b>	
			Infrastructure Analysis	water, sanitation, solid waste disposal, housing backlogs, road network and access backlogs,	DWA, ZDM, LMs, Housing, Transport, Rural Dev&Land Reform, Energy, Environmental Affairs	Relevant Technical Directors, IDP Manager	Relevant Departmental Managers	30 Sep 22

PHASE 2: STRATEGIES								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?
						<b>LMs</b>	<b>Sector Departments</b>	
<b>Phase 2: Strategies</b>	District Strategic Workshop	TBC	To craft strategies in response to the Key Development Priorities/Key Issues above		All	All relevant Managers	All relevant Managers	30 Nov 22

PHASE 3: PROJECTS								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?
						LMs	Sector Departments	
<b>Phase 3: Projects</b>	Project Planning Co-ordination	Planning and Development Forum	To identify projects in terms of the strategies		All			15 Dec 22

PHASE 4: INTEGRATION								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?
						LMs	Sector Departments	
<b>Phase 4: Integration</b>	Integration of Sector Programmes	Planning and Development Forum	Integration of sectoral programmes into the IDPs		LMs, ZDM	IDP Managers	Suitable representative	30 Nov 22

PHASE 5: APPROVAL								
PHASES OF THE IDP	ALIGNMENT ACTIVITY	ALIGNMENT STRUCTURE	WHAT WILL BE DISCUSSED?	PROPOSED HEADINGS?	WHO IS REQUIRED?			BY WHEN?

						<b>LMs</b>	<b>Sector Departments</b>	
<b>Phase 5: Approval</b>	Adoption of draft IDP							28 Feb 23
	Adoption of final IDP	Growth and Development Forum/IDP Rep Forum	Adopt District IDP		All	IDP Managers	Suitable representative	30 May 23
	Compilation of District Summary of LM IDPs							30-Jul 23

<b>Phase/Activity</b>	<b>Proposed Completion Timeframe</b>
Situational Analysis	31 Sept 2022
Development Strategies	30 Nov 2022
Projects	15 Dec 2022
Integration	28 February 2023
Draft Approval	30 March 2023
Final Approval	30 May 2019

## 5.9 Other Timeframes as part of the Process

<b>Activity/Process</b>	<b>Deadlines(MFMA)</b>
Conclude performance agreements	31 Aug 2022
Make public SDBIP	31 Aug 2022
Make public Performance Agreements	31 Aug 2022
Performance agreements onto website	31 Aug 2022
Commence IDP Review	31 Aug 2022
Table to council process timeframes	31 Aug 2022
Advertise Process Timeframes	31 Aug 2022
Submit Financial Statements to AG	31 Aug 2022
Conclude Strategic Planning	30 Nov 2022
Commence Development of SDBIP	01 Dec 2022
Preparation of Annual Report	01 Dec 2022
First draft budget and policies completed	30 Nov 2022
Community and stakeholder Consultation	30 Nov 2022
Finalise first draft annual report	15 Dec 2022
Mid-Year Term report tabled to council	26 Jan 2023
Tabling and approval of adjustment budget	31 Jan 2023
Tabling of Annual Report to council	31 Jan 2023
Advertise Annual Report	31 Jan 2023
Finalise detailed operating and capital budget	31 Jan 2023
Advertise Annual report of council on website	09 Feb 2023
Table budget to council	31 Mar 2023
Advertise budget	31 Mar 2023
Consider tabled annual report	31 Mar 2023
Adopt oversight report	31 Mar 2023
Consultation on tabled budget(roadshows, wards)	02 Apr 2023
Oversight report made public	09 Apr 2023
Conclude consultation with community	30 Apr 2023
Prepare final budget	01 May 2023



Table IDP, budget and SDBIP	31 May 2023
Approve SDBIP	29 June 2023
Draft Annual Performance Agreements to Mayor	15 June 2023

## 6. Submission of IDPs to COGTA MEC

The following dates are as per the COGTA IDP Management Plan:

Activity	Date	Responsible
Draft IDP	30 Mar 2023	ZDM
Final IDP	08 Jul 2023	All Municipalities

## Requirements and Legislation

Planning and implementation will be guided by the following pieces of legislation and policies;

- Constitution of the Republic of South Africa
- Municipal Systems Act No 32 of 2000
- Municipal Structures Act
- Planning Development Act
- Draft Land Use Management Bill
- National Spatial Development Perspective
- New Growth Path
- Provincial Growth and Development Strategy
- Provincial Spatial and Economic Development Strategy

## 8. Activity and Resource Plan

Item No.			Planning Activity	Type of Event	Community Participation	Time Required (in wks)
1			Preparation			
	1.1		Drafting of Framework Plan	Desk		2
	1.2		Approval of Framework Plan	DM Council/LM Councils		
	1.3		Drafting of Process Plan	Desk	X	2
	1.4		Approval of Process Plan	DM Council/LM Councils		
			<b>Preparation Completion</b>			<b>4</b>
2			IDP Planning Process			
	2.1		Phase 1: Analysis			
		2.1.1	Institutional Analysis	Desk		2
		2.1.5	Financial Analysis	Desk		
		2.1.2	Technical Analysis	Desk		2
		2.1.3	Economic Analysis	Desk		
		2.1.4	Environmental Analysis	Desk		2
		2.1.6	In depth Analysis/Consultation of Municipal Analysis	Rep Forum/Planners	X	2

	2.2		Phase 2: Strategies			
		2.2.1	Vision, mission, values	Council		1
		2.2.2	Gap Analysis and strategies	Council/District Wkshop		3
		2.2.3	Link KPAs and objectives to Sectoral Functions	Desk		2
			<b>Phase 2: Completion</b>			<b>6</b>
	2.3		Phase 3: Projects			
		2.3.1	Identify Capital Projects			3
		2.3.2	Identify Sector Plans/Programmes			3
		2.3.3	Sectoral Operational Business Plans			
			<b>Phase 3: Completion</b>			<b>6</b>
	2.4		Phase 4: Integration			
		2.4.1	Integration of Processes	Desk		2
		2.4.2	Institutional Restructuring			1
		2.4.3	Integrated Communication Plan			
			<b>Phase 4: Completion</b>			<b>3</b>
	2.5		Phase 5: Approval			
		2.5.1	District Alignment			3
		2.5.2	Public Comments		X	
		2.5.3	Provincial and National Alignment			
		2.5.4	Final Approval			
			<b>Phase 5: Completion</b>	<b>Desk</b>		<b>4</b>
			Planning Process Completion			
3			Annual Implementation			
	3.1		Operational Business Plans/Performance Agreements	Desk		2
	3.2		Municipal Budget			2
	3.3		Monitoring, evaluation and review	Desk		
			<b>Annual Implementation</b>			<b>4</b>

ZDM IDP REVIEW 2017/2018 PROCESS PLAN ACTIVITIES AND DATES				DATE	
Prepare for 2019/2020 IDP Review					
A	1	1.1	Drafting of Framework Plan	Aug-22	
		1.2	Drafting of Process Plans	Aug-22	
		1.3	Submit draft Process Plans to MEC	Aug-22	
		1.4	Incorporate comments from MEC(where applicable)	Aug-22	
		1.5	Table both the IDP Process Plan and Framework Plan to Council	Aug-22	
Physical IDP review					
B	1	Phase 1: Analysis			
		1.1	Consultation (PLED)	Aug-22	
		1.2	Institutional Analysis	Aug 22 to Sep 2022	
		1.3	Financial Analysis	Aug 22 to Sep 2022	
		1.5	Technical Analysis	Aug 22 to Sep 2022	
		1.6	Economic Analysis	Aug 22 to Sep 2022	
		1.9	Environmental Analysis	Aug 22 to Sep 2022	
		1.1	Consolidation of In Depth Analysis	Aug 22 to Sep 2022	
		1.7	Consultation (PLED)	Oct-22	
	2	Phase 2: Strategies			
		2.1	Vision, Mission and Values	Nov-22	
		2.2	Gap Analysis and Strategies (District Council Workshop/Rep Forum)	Nov-22	
		2.3	Develop Performance measures (kpas, kpis, targets)	Nov-22	
		2.4	Link KPAs and objectives to Sectoral Functions	Nov-22	
			Conclude first draft budget and table to council for discussion	Nov-22	
	3	Phase 3: Projects			
		3.2	Identify Capital Projects (including community and stakeholder consultation)	Dec-22	
		3.3	Identify Sector Plans/ Programmes	Dec-22	
		3.4	Sectoral Operational Business Plans	Dec-22	
		3.5	Link Sectoral Operational Business Plans with Key performance measures	Dec-22	
		3.6	Consultation (PLED)	Dec-22	
	4	Phase 4: Integration			Dec-18
		4.1	Integration of Processes	Dec-22	
		4.2	Institutional Restructuring (where applicable)	Dec-22	
		4.3	Integrated Communication Plan	Dec-22	
		WSDP			
		4.4	Submission of draft WSDP document to WSDP Steering Committee		

<b>C</b>		1.1	Submission of draft WSDP document to Portfolio Committee for Comments	Jan-23
		1.2	Submission of draft WSDP Review document to WSA	Feb-23
		1.3	WSDP and IDP Steering Committee Approval	Mar-23
		1.4	Representative Forum Approval	Mar-23
		1.5	EXCO Approval	May-23
		1.6	Advertise for public Comment	May-23
		1.7	Council approval	Jun-23
		1.8	Submit to DWAF for approval	Jul-23
	1	<b>Phase 5: Approval</b>		
		1.1	Draft Approval	Mar-23
		1.2	District Alignment (District Rep Forum)	Mar-23
		1.3	Public Comments/Advertising	Apr-23
		1.4	Final Approval	May-23
<b>D</b>	1	<b>Post Approval Compliance Requirements</b>		
		1.1	Submission of draft IDP to MEC	Jun-23
		1.2	Physical Assessment of draft IDPs	Jun-23
		1.3	Incorporate Assessment Feedback	Jun-23
		1.4	Submission of final IDP to MEC	Jun-23