



# **Blue Crane Route Municipality (EC102)**

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*IDP/PMS/ Budget Process Plan 2026/2027*

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## ABBREVIATIONS

<b>BCRM</b>	BLUE CRANE ROUTE MUNICIPALITY
<b>CA's</b>	CHIEF ACCOUNTANTS
<b>SBDM</b>	SARAH BAARTMAN DISTRICT MUNICIPALITY
<b>CBP</b>	COMMUNITY BASED PLANNING
<b>CEO</b>	CHIEF EXECUTIVE OFFICER
<b>CFO</b>	CHIEF FINANCIAL OFFICER
<b>DPLG</b>	DEPARTMENT LOCAL GOVERNMENT
<b>HOD's</b>	HEAD OF DEPARTMENTS
<b>IDP</b>	INTEGRATED DEVELOPMENT PLAN
<b>IGR</b>	INTERGOVERNMENTAL RELATIONS
<b>LED</b>	LOCAL ECONOMIC DEVELOPMENT
<b>LG</b>	LOGAL GOVERNMENT
<b>MEC</b>	MEMBER OF EXECUTIVE COMMITTEE
<b>MFMA</b>	MUNICIPAL FINANCE MANAGEMENT ACT
<b>MSA</b>	MUNICIPAL SYSTEMS ACT
<b>MTREF</b>	MEDIUM TERM REVENUE EPENDITURE FRAMEWORK
<b>PMF</b>	PERFORMANCE MANAGEMENT FRAMEWORK
<b>SDF</b>	SPATIAL DEVELOPMENT FRAMEWORK
<b>SDBIP</b>	SERVICE DELIVERY BUDGET IMPLEMENTATION PLAN

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## STRATEGIC DIRECTION FOR 2022-2027 INTERGRATED DEVELOPMENT PLAN

The BCR municipality is “A municipality that provides a better life for all its citizens”. The vision is aligned to the five development priorities and the national and provincial government strategic frameworks. The plans and budgets of the BCR are also designed /developed to achieve the vision.

The main purpose of a vision statement is to link the current situation with the future potential of an area. As such a vision statement plays a central role throughout the various processes of the IDP. It guides the prioritisation of needs, the setting of objectives and the implementation of various strategies and projects. The vision statement should be brief, inspiring, realistic, relevant and mobilising. It is important to reflect on the vision and mission of the municipality as a reminder of the direction the municipality should take in deciding on programmes on projects.

**The vision and mission of BCRM is**

### **VISION**

***A municipality that provides a better life for all its citizens.***

### **MISSION**

***Through public participation, accountable governance, sound financial management, promotion of socio-economic development and provision of safe and healthy environment that will yield sustainable basic services***

**Values**

- Good governance;
- Good ethics
- Accountability;
- Transparency
- Public Participation; Inclusivity
- People Development;
- Team work;
- Integrity;
- Tolerance;
- Honesty;
- Responsibility; and trust
- Equality
- Ubuntu
- Services excellence
- Responsiveness
- Accessibility

## 1. INTRODUCTION

Section 28 of the Municipal Systems Act, No 32 of 2000 states that:

*“Each municipal council, within a prescribed period after the start of its elected term, must adopt a process set out in writing to guide the planning, drafting, adoption and review of its integrated development plan”*

Section 29 also requires 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, 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 25 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*

The IDP/PMS/ Budget Process Plan has a clear established mechanisms, procedures and processes to ensure proper consultation with the local communities. The process plan points out the manner in which IDP, PMS and Budget processes for 2025/2026 will be undertaken in terms of the following:

- The structures that will manage the planning process
- Public participation
- Roles and responsibilities
- How will the process be monitored
- Time schedule for the planning process

## 1.2. Legal context

The Municipal Finance Management Act, No 56 of 2003 (MFMA) clearly stipulates the time-frames for the IDP and Budget.

*Section (21) and (24) of the MFMA requires the Budget and IDP schedule (or Process Plan) to be adopted by Council by the end of August, the draft budget and IDP to be tabled before the council in March and final budget and IDP to be adopted by council in May each year.*

## 1.3. Purpose of the Process Plan

The purpose of formulating a Process Plan is to ensure the following:

- Involvement of the local community in the development, implementation and review of the municipality's performance
- To allow the community to participate in the setting of appropriate key performance indicators and performance targets for the municipality
- To depict and commit on time frames for smooth running and sequence of activities
- Cost estimates with dedicated involvement from specific role players in the municipality

The Process Plan therefore aims to address the following aspects:

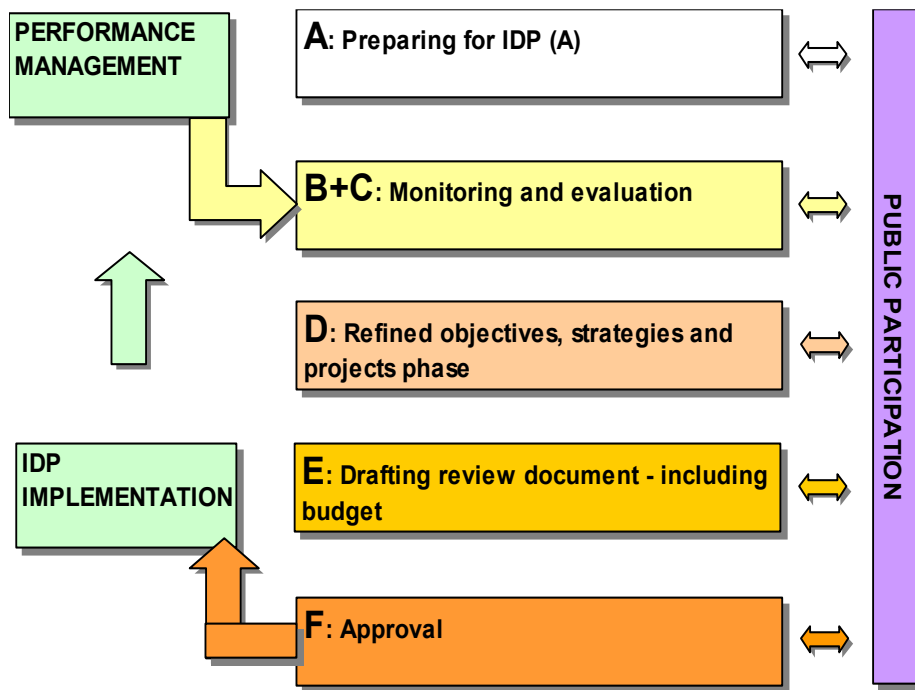
- Distribution of roles and responsibilities in the IDP, PMS and Budget Processes
- Organisational Structures / Institutional Arrangements for the IDP Process
- Action Plan with time frames and resource requirements
- Mechanisms and procedures for community and stakeholder participation
- Mechanisms and procedures for alignment
- Binding plans and planning requirements from provincial and national level
- Cost estimate for the planning process
- Performance Management System

## 1.4. Elements of IDP and Budget

- MEC's comments
- Consideration and inclusion of any new information
- Areas requiring attention not addressed during the review of the previous IDP
- The inclusion of outstanding and reviewed Sector Plans/Strategies
- Ward Based Plans
- Past year's performance and audit outcome
- Alignment with national and provincial policies, District municipality, provincial and national government planning and budgeting.
- Financial Sustainability and revenue enhancement plans
- Development of objectives, strategies and projects.

## 2. METHODOLOGY

The process to be undertaken is based on IDP guidelines. The process will ensure that each phase complies with the required legislation, municipal needs and is within the municipality's available financial and human resources. The process reflected in the diagram below represents a continuous cycle of planning, implementation and review. Implementation commences after the Municipal Council adopts the IDP and Budget.



### 3. ORGANISATIONAL ARRANGEMENT

In order to ensure smooth and well-organized IDP, PMS and Budget processes for 2025/2026 financial year, the following structures will guide the IDP and Budget processes.

#### 3.1. Council

(a) Prepares, decides on and adopts an IDP, PMS and Budget Process Plan.

(b) Undertake the overall management and co-ordination of the IDP, PMS and Budget Processes which includes ensuring that:

- (i) all relevant actors are appropriately involved.
- (ii) appropriate mechanisms and procedures for public consultation and participation are applied;
- (iii) the planning events are undertaken in accordance with the time schedule.
- (iv) the IDP/PMS/Budget Process is related to the real burning issues in the municipality and that it is a strategic and implementation-oriented process; and

- (iv) the sector planning requirements are satisfied.

### **3.2. Ward Councillors**

Councillors are the major link between the municipal government and the residents. As such, their role is to:

- (a) Link the IDP, PMS and Budget processes to their constituencies and / or wards;
- (b) Responsible for organizing public consultation and participation;
- (c) Ensure the annual business plans and municipal budget are linked to and based on the IDP.

### **3.3. Municipal Manager**

As head of administration the municipal manager is responsible and accountable

- Implementation of the municipality's IDP,
- Monitor progress on the implementation of the plan.
- Manage Integrated Development Planning and Budgeting processes and further delegates some of the functions to the IDP/PMS Manager.

### **3.4. IDP/PMS/Budget Representative Forum**

The IDP/PMS/Budget Representative Forum is the structure which facilitates and co-ordinates participation in the IDP/Budget/PMS Process. The selection of members to the IDP/PMS/Budget Representative Forum needs to be based on a criterion which ensures geographical and social representation. The IDP/PMS/Budget Representative Forum is chaired by the Mayor or a Councilor delegated by Mayor.

The role of the IDP/PMS/Budget Representative Forum is to—

- represent the interests of the constituents in the IDP, PMS and Budget processes;
- forms a structured link between the municipality and representatives of the public;
- ensure communication between all the stakeholder representatives including the municipality;
- provides an organizational mechanism for discussion, negotiation and decision making between the stakeholders including municipal governance;

- prioritize issues, integrate strategies, projects and programmes and identify budget requirements; and
- monitor the performance of the planning and implementation process.

***Composition:***

- all Councillors
- the Chairperson of the organized structure or association within the community accompanied by one member of the structure
- officials who serve in the Steering Committee;
- Sector departments
- Ward committees and Community Development Workers

### **3.5. Technical and Political IDP /PMS /Budget Steering Committee**

The Political IDP/PMS/Budget Steering Committee is a political working team chaired by the Mayor or his delegated representative. The Committee, amongst other issues, considers the agenda items to be discussed in the IDP/PMS/Budget Rep Forum. The Political Steering Committee consist of the Mayor, Municipal Manager, Senior Management and EXCO

Technical IDP/PMS/Budget Steering Committee is a technical working team chaired by the Municipal Manager or his delegated representative; consisting of the s56 managers and section heads. The committee is responsible for—

- Ensuring a smooth compilation and implementation of the IDP.
- Facilitating the terms of reference for the various planning activities; commissions studies necessary for the compilation of the IDP;
- Processing and documenting inputs from the public concerning IDP and Budget
- Processing, summarizing and documenting outputs;
- Making content recommendations;
- Facilitating control mechanisms regarding the effective and efficient implementation, monitoring and amendment of the IDP;
- Ensuring the co-ordination and integration of sectoral plans and projects; and

- Ensuring that the municipal budget is in line with the IDP.

## 4. COMMUNITY PARTICIPATION

One of the main features of the integrated development planning, performance management and budgeting processes is the involvement of community and stakeholder organizations in the process. Participation of affected and interested parties is obligatory in the IDP development and review processes (Chapter 4 of the Municipal Systems Act). This is to ensure that the IDP addresses the real issues that are experienced by the citizens of a municipality.

The municipality reaches the community through:

- Roadshows/Mayoral visits
- Ward Based Planning
- Social networks
- Loudhailer
- Notice boards
- Local News paper
- Dissemination of the information in libraries and municipal offices

The IGR is also a platform where the involvement and participation of government sectors is ensured in order to strengthen integration of programmes.

The office of the Mayor also facilitates programmes that include working with:

- Community Based Organizations
- Non -Government Organizations
- Community Development Workers
- Ward Committees
- and other organized structures within the community

## 5. PROCEDURES FOR ALIGNMENT

The preparation of the IDP/PMS/Budget Process Plan is informed by the engagements the municipality had with Sarah Baartman District Municipality as prescribed in section 27(1) of the Municipal Systems Act; that the District Municipality must after following consultative processes with the local municipalities within its area, adopt a framework that will bind both the district and the local municipality within the area of the district.

National sector and provincial sector legislation contains various kinds of requirements for municipalities to undertake planning. National and provincial requirements and planning documents are to be considered by the municipality during the review process. The municipality must also include all the planning documents that have been approved by Council or other strategies that might be relevant to the IDP review process, as accompanying documents to the IDP. BCRM has identified a number of projects as part of IDP that relates to policies, strategies and plans.

The Draft IDP and Budget will be tabled to council by March 2025 and will be advertised for public comments. The final IDP and MTREF Budget will be tabled to Council by May 2025.

The IDP review process will follow the following phases:

- |           |   |                            |
|-----------|---|----------------------------|
| ➤ PHASE 0 | - | PREPARATION / PRE-PLANNING |
| ➤ PHASE 1 | - | ANAYLYSIS                  |
| ➤ PHASE 2 | - | STRATEGIES                 |
| ➤ PHASE 3 | - | PROJECTS                   |
| ➤ PHASE 4 | - | INTEGRATION                |
| ➤ PHASE 5 | - | APPROVAL                   |

The table below gives further details on the above phases:

<b>ACTION PLAN</b>	
<b>Pre-Planning Phase</b>	
<ul style="list-style-type: none"> <li>• Adopt IDP, PMS &amp; Budget Process Plan</li> <li>• Advertise the process for comments</li> <li>• Resuscitate IDP, PMS and Budget Steering Committees, Rep Forum and IGR</li> <li>• Submit the process plan to Council for approval</li> <li>• Adjustment Budget roll-overs</li> </ul>	August 2025
<b>Phase 1: Analysis Phase</b>	
<ul style="list-style-type: none"> <li>• Analyze the current situation on service standards/ gaps/ backlogs/ resources.</li> <li>• Ward consultation /Mayoral Visit</li> </ul>	September 2025 – November 2025
<b>Phase 2: Strategies Phase</b>	
<ul style="list-style-type: none"> <li>• Formulate solutions to address the problems.</li> <li>• Revisit the 5 Year Strategic Plan: <ul style="list-style-type: none"> <li>-confirm vision, mission and values</li> <li>-refine objectives, strategies and KPI</li> <li>-set targets</li> <li>- Grant rollover adjustment budget</li> </ul> </li> <li>• Request inputs from sector depts Plans</li> <li>• Budget &amp; Performance Mid-year Assessment, Sec72 report – Provincial Treasury</li> <li>• Approve 2024/25 Adjustment &amp; Adjustment Budget, including a unauthorised expenditure of previous year</li> </ul>	December 2025 - February 2026  October / November 2025
<b>Phase 3: Projects Phase</b>	
<ul style="list-style-type: none"> <li>• Project prioritization</li> </ul>	February 2026– March 2026
<b>Phase 4: Integration Phase</b>	
<ul style="list-style-type: none"> <li>• Integration of programs and projects</li> <li>• Consideration of sector plans requirements and guidelines</li> <li>• IDP/Budget Benchmark Engagement – Provincial Treasury</li> </ul>	March 2026-April 2026

<b>Phase 5: Approval Phase</b>	
<ul style="list-style-type: none"> <li>• Draft IDP, Budget and SDBIP to be tabled by Council before end of March</li> <li>• Submission to MEC CoGTA within 10 days of approval / Provincial &amp; National Treasury</li> <li>• Advertise for public comment</li> <li>• IDP/Budget Road-shows: April / May</li> <li>• Incorporate relevant inputs</li> <li>• Adoption of final IDP and Budget before end of May</li> <li>• Submission to MEC CoGTA / PT and NT</li> <li>• Publish IDP and Budget within 14 days</li> </ul>	March 2026- May 2026

### ACTION PLAN 2026/2027

IDP PHASES	DELIVERABLES AND PROCESS MANAGEMENT	DATES
<b>Preparation Phase</b>	IDP/PMS/BUDGET Steering committee meeting	15 August 2025
	IDP/Budget/PMS Rep Forum and IGR Forum	22 August 2025
	Tabling of the following to Council:  IDP and Budget Process Plan 2026/27  Draft Annual Report 2024/25  Annual Performance Report 2024/25  Draft AFS 2024/25	28 August 2025
	Advertisement of IDP and Budget Process Plan	11 Sept 2025
<b>Analysis Phase</b>	IDP /Budget Public Consultations	Sept/ Oct 2025
	IGR session	24 October 2025
	IDP/PMS/Budget steering committee meeting:	28 October 2025
	Tabling of S52d 1 <sup>st</sup> quarter report to Council	29 October 2025

IDP PHASES	DELIVERABLES AND PROCESS MANAGEMENT	DATES
	IDP/PMS/Budget Rep Forum	21 Nov 2025
<b>Strategies Phase</b>	Departmental IDP Strategic Session: Preparing for the development of strategies, policies and plans	Nov-Dec 2025
	IDP/Budget Steering Committee:	12 January 2026
	Consolidation of the Mid-year budget and performance assessment report and table to council.	29 Jan 2026
	Mid-year Performance engagement with Provincial and National Treasury	Feb 2026
	Strategic Planning Session: development of municipal Strategies, Objectives, KPA's, KPI's and targets	Feb 2026
	Tabling of budget adjustment to Council	
	IDP/PMS/Budget Steering Committee: Confirm contents of the IDP, Budget and Drafting of Service Delivery and Budget Implementation Plan (SDBIP)	Feb 2026
	IDP/PMS/Budget Representative Forum & IGR session	24 Feb 2026
	Project Prioritization (Confirmation of project to be implemented)	March 2026
	Tabling of the Draft IDP and Budget	27 March 2026
	Advertise for public to comment on the Draft IDP/Budget and submit to relevant stakeholders	02 April 2026
<b>Integration/Approval Phase</b>	IGR session	14 April 2026
	IDP/Budget Steering Committee: preparations for IDP /Budget Public Consultations	17 April 2026
	IDP /Budget Public Consultations	April/May 2026
	Budget and Benchmark engagement session with Provincial and National Treasury	April 2026
	Tabling of 3 <sup>rd</sup> quarter report to Council	23 April 2026

IDP PHASES	DELIVERABLES AND PROCESS MANAGEMENT	DATES
	IDP/PMS/Budget Representative Forum: Present IDP /Budget	14 May 2026
	Tabling of the Final Draft IDP and Budget and Draft SDBIP	May 2026
	Advertise the adopted documents: IDP, Budget & SDBIP	June 2026
	Consolidation of the Annual Performance report and Annual Report	July 2026

## 6. CONCLUSION

Blue Crane Route Municipality's focus areas of 2026/2027 IDP, Budget and PMS will therefore be:

- Alignment with national and provincial policies, District municipality, provincial and national government planning and budgeting.
- Financial Sustainability and revenue enhancement, and
- Reviewing of objectives, strategies and projects addressing cross dimensional and sector specific issues.
- Development and Review of policies, plans and bylaws