Blue Crane Route Municipality (EC102)

IDP/PMS/ Budget Process Plan 2027/2028

ABBREVIATIONS

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

Table of Contents

STRATEGIC DIRECTION FOR 2027-2032 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 mobilizing. 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 2027/2028 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:

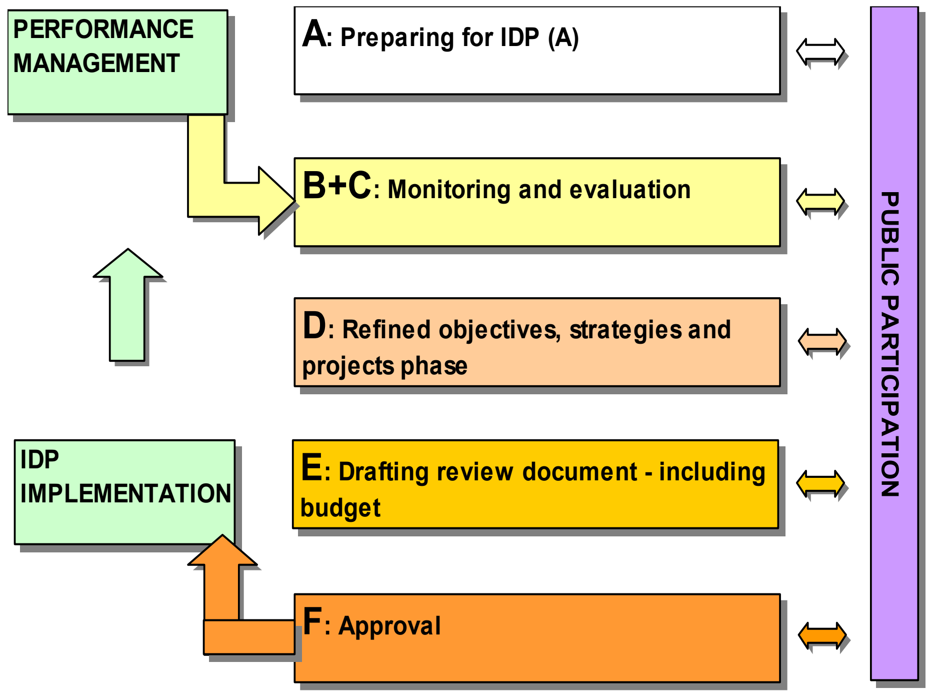
- Distribution of roles and responsibilities in the IDP, PMS and Budget Processes
- Organisational Structures / Institutional Arrangements for the IDP Process
- Action Plan with time frames and resource requirements
- Mechanisms and procedures for community and stakeholder participation
- Mechanisms 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
- Community priorities identified through public participation
- Past year's performance and audit outcome
- Alignment with national and provincial policies, District municipality, provincial and national government planning and budgeting.
- Spatial Development Framework
- Performance Management Framework
- Municipal Financial Plan
- Development of objectives, strategies and projects.
- Municipal policies and Sector Plans.
- Reviewed organizational structure .

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 2027/2028 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.
- Assist the Moyer in performing the budgetary function assigned to the Moyar in terms of Chapter 4 and Chapter 7, and
- Provide the Moyer with the administrative support, resources and information necessary for the performance of those functions.

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 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 2027 and will be advertised for public comments. The final IDP and MTREF Budget will be tabled to Council by May 2027.

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:

ACTION PLAN	
Pre-Planning Phase	
• Adopt IDP, PMS & Budget Process Plan • Advertise the process for comments • Resuscitate IDP, PMS and Budget Steering Committees, Rep Forum and IGR • Submit the process plan to Council for approval • Resuscitate Budget and MSCOA committee • Identification of budget related policies • Adjustment Budget roll-overs	August 2026
Phase 1: Analysis Phase	
• Analyze the current situation on service standards/ gaps/ backlogs/ resources. • Ward consultation (Ward priority needs, Revenue projections proposed rates and service charges • Finalization of 2025/26 APR, AFS and Audit report	September 2026 – December 2026
Phase 2: Strategies Phase	
• Formulate solutions to address the problems. • Development and Drafting of 5 Year Strategic Plan: - vision, mission and values - objectives, strategies, KPI and set targets - Grant rollover adjustment budget • Request inputs from sector departments • Budget & Performance Mid-year Assessment, • Submission of Sec72 report – Provincial Treasury	December 2026 - February 2027
Phase 3: Projects Phase	
• Approve 2026/27 Adjustment & Adjustment Budget, including a unauthorised expenditure of previous year • Consideration of the mid-year review and any corrective measures proposed from the previous year's financial statement and annual report • Project prioritization • Budget and MSCOA committee	February 2027– March 2027

<table>
<tr><th colspan="2">Phase 4: Integration Phase</th></tr>
<tr><td>Integration of programs and projects
Consideration of policies sector plans requirements and guidelines
IDP/Budget Benchmark Engagement – Provincial Treasury</td><td>March 2027-April 2027</td></tr>
<tr><th colspan="2">Phase 5: Approval Phase</th></tr>
<tr><td>Draft IDP, Budget and SDBIP to be tabled by Council before end of March
Submission to MEC CoGTA within 10 days of approval / Provincial & National Treasury
Advertise for public comment
IDP/Budget Benchmark Engagement – Provincial Treasury
IDP/Budget Road-shows: April / May
Incorporate relevant inputs
Adoption of final IDP and Budget by end of May
Submission to district municipality CoGTa / PT and NT
Publish IDP and Budget within 14 days
Consolidation of 2026/27 APR report and Annual Report
Signing of Performance Agreement</td><td>March 2027- JULY 2027</td></tr>
</table>

ACTION PLAN 2027/2028

IDP PHASES	DELIVERABLES AND PROCESS MANAGEMENT	DATES
Preparation Phase	IDP/PMS/Budget /MSCOA Steering committee meeting	25 August 2026
	IDP/Budget/PMS Rep Forum and IGR Forum	25 August 2026
	Tabling of the following to Council: IDP and Budget Process Plan 2027/28 Draft Annual Report 2025/26 Draft Annual Performance Report 2025/26 Draft AFS 2025/26 Performance Agreements: 2026/2027	31 August 2026
	Advertisement of IDP and Budget Process Plan	08 Sept 2026
Analysis Phase	Tabling of Section 52d 1st quarter report to Council	26 October 2026
	IDP /Budget Public Consultations	Nov/December 2026
	IDP/PMS/Budget /MSCOA Steering committee meeting	December 2026
	IDP/PMS/Budget Rep Forum / IGR session	December 2026
Strategies/Project Phase	Departmental IDP Strategic Session: Preparing for the development of strategies, policies and plans	Nov-Dec 2026
	IDP/Budget Steering Committee:	18 January 2027
	Consolidation of the Mid-year budget and performance assessment report and table to council.	26 Jan 2027
	Mid-year Performance engagement with Provincial and National Treasury	Feb 2027
	Strategic Planning Session: development of municipal Strategies, Objectives, KPA's, KPI's and targets	Feb 2027
	Tabling of budget adjustment to Council	

IDP PHASES	DELIVERABLES AND PROCESS MANAGEMENT	DATES
	IDP/PMS/Budget Steering Committee: Confirm contents of the IDP, Budget and Drafting of Service Delivery and Budget Implementation Plan (SDBIP)	Feb 2027
	IDP/PMS/Budget Representative Forum & IGR session	24 Feb 2027
	Project Prioritization (Confirmation of project to be implemented)	March 2027
	Tabling of the Draft IDP and Budget	16 March 2027
	Advertise for public to comment on the Draft IDP/Budget and submit to relevant stakeholders	01 April 2027
Integration/Approval Phase	IDP/Budget /PMS /MSCOA Steering Committee: preparations for IDP /Budget Public Consultations	19 April 2027
	IDP /Budget Public Consultations	April/May 2027
	Budget and Benchmark engagement session with Provincial and National Treasury	April 2027
	Tabling of 3rd quarter report to Council	April 2027
	IDP/PMS/Budget Representative Forum: Present IDP /Budget	May 2027
	Tabling of the Final Draft IDP and Budget and Draft SDBIP	May 2027
	Advertise the adopted documents: IDP, Budget & SDBIP	June 2027
	• Consolidation of the Annual Performance report and Annual Report • Signing of Performance Agreements	July 2027

6. CONCLUSION

Blue Crane Route Municipality’s focus areas of 2027/2028 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