



## STANDARD OPERATING PROCEDURE FOR COMPILING A TIME SCHEDULE OUTLINING KEY DEADLINES

Standard Operating Procedure (SOP) in terms of the compilation, adoption and implementation of a Time Schedule outlining key deadlines in terms of section 21 of the Municipal Finance Management Act (MFMA).	Version #: <b>1.0</b>
Approved for implementation by:  <div style="text-align: center; margin-top: 20px;">           _____            Signature of MM         </div>	Date Approved:  Effective Date:

### LIST OF ABBREVIATIONS

<b>IDP</b>	Integrated Development Plan
<b>JDMA</b>	Joint District and Metro Approach
<b>MFMA</b>	Municipal Finance Management Act, 2003 (Act No. 56 of 2003)
<b>MSA</b>	Local Government: Municipal Systems Act, 2000 (Act No. 32 of 2000)
<b>NT</b>	National Treasury
<b>SOP</b>	Standard Operating Procedure

## 1. PURPOSE

This Standard Operating Procedure applies to the Bitou Municipality in terms of the steps to be followed in respect of the compilation and approval of the Time Schedule outlining Key Deadlines.

## 2. INTRODUCTION

The MFMA stipulates that the Mayor must at least 10 months before the start of the budget year, table to council a time schedule outlining key deadlines guiding the IDP review process and the preparation, tabling and approval of the budget a for a municipality.

Section 21 indicates that:

(1) The mayor of a municipality must—

(a) co-ordinate the processes for preparing the annual budget and for reviewing the municipality's integrated development plan and budget-related policies to ensure that the tabled budget and any revisions of the integrated development plan and budget-related policies are mutually consistent and credible;

(b) at least 10 months before the start of the budget year, table in the municipal council a time schedule outlining key deadlines for—

(i) the preparation, tabling and approval of the annual budget;

(ii) the annual review of—

(aa) the integrated development plan in terms of section 34 of the Municipal Systems Act; and

(bb) the budget-related policies;

(iii) the tabling and adoption of any amendments to the integrated development plan and the budget-related policies; and

(iv) any consultative processes forming part of the processes referred to in subparagraphs (i), (ii) and (iii).

(2) When preparing the annual budget, the mayor of a municipality must—

(a) take into account the municipality's integrated development plan;

(b) take all reasonable steps to ensure that the municipality revises the integrated development plan in terms of section 34 of the Municipal Systems Act, taking into account realistic revenue and expenditure projections for future years;

(c) take into account the national budget, the relevant provincial budget, the national government's fiscal and macro-economic policy, the annual Division of Revenue Act and any agreements reached in the Budget Forum;

(d) consult—

(i) the relevant district municipality and all other local municipalities within the area of the district municipality, if the municipality is a local municipality;

- (ii) all local municipalities within its area, if the municipality is a district municipality;
- (iii) the relevant provincial treasury, and when requested, the National Treasury;
- and
- (iv) any national or provincial organs of state, as may be prescribed; and
- (e) provide, on request, any information relating to the budget—
  - (i) to the National Treasury; and
  - (ii) subject to any limitations that may be prescribed, to—
    - (aa) the national departments responsible for water, sanitation, electricity and any other service as may be prescribed;
    - (bb) any other national and provincial organ of states, as may be prescribed; and
    - (cc) another municipality affected by the budget.

The table below sets out the difference between and a summary of the requirements for a District Framework versus that of a Process Plan and a Time Schedule.

<b>Time Schedule (Annually)</b>	<b>Process Plan (Five Year)</b>	<b>District Framework (Five Year)</b>
In accordance with section 21 of the MFMA the Council must adopt a time schedule outlining key deadlines for the tabling and adoption of the annual review/amendment of the IDP, any amendments to the IDP and consultative processes which form part of the annual IDP and Budget review.	The Process Plan in accordance with section 28 of the MSA is a process set out in writing to guide the planning, drafting, adoption and review of its initial 5-year IDP after the start of Councils elected term. It contains events to be undertaken in the process of developing the actual IDP and supporting IDP processes of the local municipalities to ensure alignment in the case of a District Municipality.	The District Framework in accordance with section 27 of the MSA must be adopted by the district municipality within a prescribed period after the start of its elected term. The Framework, amongst others, obligates both the district and the local municipalities in its area on binding legislation, IDP matters which require alignment and procedures for consultation during the process of drafting their respective IDPs.

### 3. SCOPE

This SOP applies to the \_\_\_\_\_ Municipality and to all relevant officials involved in the compilation and approval of a Time Schedule.

The steps to be followed in the compilation and approval of a Time Schedule is set out in section 4 below.

#### 4. SOP STEPS

NO.	STEP ("WHAT?")	TIMING ("WHEN?")	RESPONSIBILITY ("BY WHOM?") <sup>1</sup>
1	Engage the Department of Local Government: IDP Directorate for any specific requirements applicable to the Time Schedule for the next review cycle.	Before end of August	IDP Manager
2	<b>Content of Time Schedule</b>		
2.1	Take in consideration the MFMA Finance Management Calendar.		IDP Manager
2.2	Co-ordinate the scheduling of development/review/update for policies and sector plans, strategies, programmes, and projects.		IDP, Finance and Performance sections
2.3	Consult with the Finance and Performance section to consolidate all IDP, Budget and Performance Management related planning activities unique to the Municipality i.e., Budget Steering Committees.		IDP, Finance and Performance sections
2.4	Take into account the provisional public participation dates and Provincial IGR Calendar.		IDP Manager
2.5	Take note of the joint planning activities, mechanisms, structures, processes, and procedures as well as alignment requirements as set out in the adopted District Framework.		IDP Manager
2.6	Identify and reflect on all JDMA processes, Provincial IGR Calendar and municipal specific planning related activities i.e., reviewing of sector plans (SDF, WSDP, DMP etc.) and following the IDP amendment process (where applicable).		IDP Manager
	<b>Processes related to Time Schedule</b>		
3.1	Consolidate information and develop the Municipality's first draft Time Schedule.		IDP, Finance and Performance sections
3.2	Convene regular planning alignment engagements between the district and the local municipalities within its area.		District and Local IDP Managers
3.3	Sequence and synchronize the planning, budgeting, implementation and reporting activities of district and local municipalities on a monthly basis (inclusive of sector planning activities).		District and Local IDP Managers

NO.	STEP ("WHAT?")	TIMING ("WHEN?")	RESPONSIBILITY ("BY WHOM?") <sup>1</sup>
3.4	Reflect standardization of the legislated activities as per MFMA Finance Management Calendar in all draft Time Schedules.		District and Local IDP Managers
3.5	Submit draft Time Schedule to Senior Management for input and update accordingly.		IDP Manager
3.6	Compile an item to the Municipal Council on the draft Time Schedule.		IDP Manager/Finance section
3.7	Table Time Schedule to council at least 10 months before the financial year begins (no later than August) for consideration and approval.		Mayor
3.8	Publicize the Time Schedule on the municipal website.		IDP Manager
3.9	Circulate the approved Time Schedule to Provincial Treasury and the Department of Local Government: IDP Directorate.		The Municipality
3.10	Implement all activities contained within the Time Schedule throughout the annual IDP review process and the preparation and approval of the budget.		The Municipality
3.11	Report the implementation of planning activities related to the development, review and adoption of planning instruments (District Framework, Process Plan and Time Schedule).		IDP Manager
3.12	Effect, if necessary, revisions to the Time Schedule as and when required during the applicable financial year – Table revised Time Schedule to council where applicable.		The Municipality