

# Performance Management

in terms of the PFMA



A five-day short course of the *Public Finance Management Programme*<sup>™</sup>  
presented in Pretoria

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5 day course

11 – 15 June 2012  
12 – 16 November 2012



## Background:

The concepts of *Performance* and *Management* are the cornerstones of the “quiet revolution” and the paradigm shift introduced by the *Public Finance Management Act* and *Municipal Finance Management Act*. Whilst “Performance” relates to the three E’s (efficiency, effectiveness and economy), the concept of “Management” stresses the change of emphasis from administering finances and resources to the management thereof. In fulfilling their functions as public sector managers, a *symbiosis* has to be accomplished between the two concepts.

Since private sector legislation does not support the concept of Performance Management, the public sector is called upon to provide the leading edge on issues of Performance Management. In addition, the necessity for Performance Management increases as communities apply pressure for services to be provided more efficiently and effectively to reduce the demand on taxpayers while maintaining the volume and quality of existing services supplied to the public.

## This course:

This course is designed to introduce participants to multidimensional performance management and measurement and to empower them to deal effectively and efficiently with the requirements of the current legislation as well as the information needs of the ever growing body of stakeholders such as fund-granting bodies. The course strikes a balance between performance management *skills* and the conceptual *knowledge* required to understand these concepts. Case studies and the dissemination of international best practices on the topic form an integral part of the learning experience.

## Who should attend:

The concepts of performance management and measurement are so central to the *Public Finance Management Act* and *Municipal Finance Management Act* that they do not apply to one particular group only. Appropriate models discounting South African circumstances and characteristics of individual departments and organisations can only be developed in a team context. It is therefore imperative that the widest possible staff component is exposed to these educational and skills transfer opportunities. This course is specifically designed from a public sector perspective and suited for all officials who are involved in performance management and measurement. These functionaries will benefit greatly from attending this five-day short course: Performance Management.

## Time schedule:

The daily program starts at 08:30 and ends at 16:00. On the last day of the short course the program ends at 12:00 to accommodate travel arrangements of participants, therefore no lunch is served on the day of departure.

## Presented by:

**SAIGA**

ADVANCING AUDITING AND ACCOUNTABILITY

The Southern African Institute  
of Government Auditors

[www.saiga.co.za](http://www.saiga.co.za)

SAIGA can deliver!



# Contents:

As for all courses which form part of the Public Finance Management Programme™, the content is designed around and based on the requirements of the *Public Finance Management Act*. International best practices in respect of the topic also forms an integral part of the short course. Topics dealt with in this five-day course include:

## Reasons for introducing Performance Management (PM) in the public sector

▶ Legal requirements; ▶ Good organisation management; ▶ Understanding customer requirements; ▶ Benefits of PM; ▶ Limitations of PM; ▶ Relationship of PM and budgeting; ▶ Best practices in PM

## Strategic objectives and PM

▶ Interpreting visions and missions; ▶ Strategy analysis; ▶ Determination of strategic objectives  
▶ Measures of success (short and long term)

## Type of Performance Measures

▶ Efficiency; ▶ Effectiveness; ▶ Economy; ▶ Outcomes; ▶ Interaction between measures; ▶ Critical success factors; ▶ Characteristics of good metrics (directional, quantitative and worthwhile); ▶ Customer measure and service measures

## Designing a PM system

▶ Interpreting objectives; ▶ Behavioural aspects; ▶ Availability of measures (electronically); ▶ Reporting frequencies; ▶ Levels of reporting and measurement; ▶ Identifying customers of the system; ▶ Cost of measurement

## Technology

▶ Understanding different technologies; ▶ Linking with legacy systems; ▶ Gathering of data, quality and integrity; ▶ Analytical tools; ▶ Visualisation tools; ▶ Web information portals; ▶ Review of several vendor offerings

## Techniques

▶ Critical success factors; ▶ Balanced scorecards; ▶ Performance pyramids; ▶ Stakeholder models; ▶ EP2m model; ▶ Business excellence framework; ▶ Benchmarking; ▶ Activity-based costing; ▶ Total Quality Management (TQM); ▶ Weighted impact structured evaluation

## Organisational improvement opportunities

▶ Identifying improvement opportunities; ▶ Business process re-engineering; ▶ Feasibility studies; ▶ Analytical techniques; ▶ The learning organisation; ▶ Continuous improvement

## Change management

▶ Change agents; ▶ Understanding corporate culture; ▶ Change control procedures; ▶ Behavioural aspects; ▶ Dealing with conflict; ▶ Communication of objectives, results and impacts; ▶ Participation in process; ▶ Creating feedback loops; ▶ Dealing with adverse effects of measurement

## Performance appraisal

▶ Goal congruence between groups, departments, individuals and organisation; ▶ Accountability for results and empowerment; ▶ Linking individual performance to organisational performance; ▶ Performance incentives (financial and non-financial); ▶ Outputs vs outcomes analysis; ▶ Employee satisfaction indices

## The PM environment

▶ Organisations; ▶ Training; ▶ Publications; ▶ Websites; ▶ International comparisons

## Review and evaluation

▶ Analysing impact of PM on organisational performance; ▶ Review of applicability of measures; ▶ Techniques; ▶ Frequency of reviews

The presentation is supported by case studies to effect skills transfers and illustrate practical application. Participants receive complimentary notes to facilitate continued learning even after the course itself has ended. Course content and focus may be adjusted and the emphasis changed based on feed-back from participants.

- Participants have to bring along financial calculators to enable them to do practical examples in class.

## The Organisation: NPO registration number: 045-133 NPO

The **Southern African Institute of Government Auditors** is a non-profit organisation. Its constitutional objectives include the advancement of auditing and accountability. Through the presentation of high-quality, affordable courses, the Institute aims to facilitate the sharing of knowledge and the empowerment of South Africa's people. The Institute supports the prioritisation of the concepts of *economy*, *efficiency* and *effectiveness*.

The **Public Finance Management Academy™** was founded by SAIGA to provide high quality, affordable continued professional education which is tailor-made for the public financial manager and government auditor.

Visit us at: [www.saiga.co.za](http://www.saiga.co.za)



**Course Rating  
Applicability:**national & provincial  
departmentslocal  
authoritiespublic  
entities

## Certification and accreditation:

This course forms part of the *Public Finance Management Programme*<sup>™</sup>. For more information on the PFM Programme, visit our website: [www.saiga.co.za](http://www.saiga.co.za) The Public Finance Management Academy<sup>™</sup> will issue course participants with a certificate of attendance under the seal of the Southern African Institute of Government Auditors. Participants earn 30 Educational Credits (EC's) for attending this short course. The Public Finance Management Academy<sup>™</sup> maintains a central register where these credits are administered. The ECs provide participants with focus and clearly stated objectives. This assists employers to monitor the continued professional education and training (CPE) progress, and the manner in which their staff is committed to CPE.

The PFM Programme is developed and structured on the outcomes based education (OBE) model. This short course and its Educational Credits form part of the requirements for the *Portfolio of Short Courses*. In order to complete the Portfolio of Short Courses, participants have to meet two basic requirements: earn a minimum of 120 EC's and enroll for and complete an assessment. SAIGA and the Public Finance Management Academy<sup>™</sup> utilise educational and professional experts to function as quality assurers of this course and the course design, structure and material are subject to quality control and assessment by these experts.

National Treasury set up a Validation Board to "accredit" or "validate" short-term training programmes and to address coordination and quality issues which surround the programmes available to existing employees (this Board ceased to operate in 2006). The aims of the validation mechanism were to coordinate activities and to advise departments of relevant programmes which target identified needs and are delivered to a suitable quality. The Short Courses of SAIGA's Public Finance Management Programme<sup>™</sup> were all accredited by the National Treasury's Validation Board until it ceased to operate in 2006..

## Costs:

The course fee of R7,296.00 (R6,400 plus 14% VAT) includes attendance for all *five* days, course file, a certificate, hand-outs, notes, case studies and solutions. The Institute will also provide participants with a free lunch as well as free tea/coffee at 10:00 and 15:00. Staff of corporate members of *The Southern African Institute of Government Auditors* (SAIGA) can claim a discount of R684 (R600 plus 14% VAT).

## The venue:

The courses are mostly presented at the UNISA Sunnyside Campus in Pretoria. Maps and details of the lecturing hall/venue will be faxed/posted to participants after payment has been received. Please note that courses may be shifted to other venues due to various circumstances beyond our control and to accommodate the demand as far as possible. The SAIGA Secretariat will only send maps to participants who have provided proof of payment (faxed a copy of the deposit slip) or made explicit arrangements with the Secretariat regarding payment.

## Bookings:

Since only a limited number of participants can be accommodated, bookings will be handled on a first-come-first-served basis. To avoid disappointment submit your registration as soon as possible.

*Changes / cancellations:* Tax invoices will be issued (faxed and posted) on receipt of your booking. Once a tax invoice has been issued the department/delegate will be held liable for payment of the full course fee. No refunds can be made, but alternative delegates (substitutes) may attend the same course at no extra cost. All booking changes or cancellations are charged at R1,368.00 (R1,200 plus 14% VAT) per delegate booking. No cancellations or changes in booking will be accepted if not received in writing at least 5 working days before the course. Invoices must be paid before the course starts. No certificates will be issued if payment is outstanding. Outstanding payments incur 2% interest per month. Due to the minimal information which banks provide in respect of direct deposits, participant have to fax their deposit slips / electronic transfer slips to the Secretariat and state the invoice number/(s) to which the deposit refers. As required by recent legislation, VAT numbers have to be provided with registration. The Institute reserves the right to cancel a particular course due to unforeseen circumstances e.g. insufficient bookings or unavailability of venues (in the last few years, only a few courses had to be cancelled). In such event, participants will be informed at least two weeks before the scheduled course date of such cancellations. Participants who have paid their fees will receive full refunds in the event of SAIGA cancelling a course (SAIGA's liability in such event is limited to this refund).

## Presenters:

Our presenters are a blend of professional managers, chartered accountants and educators with wide experience in the presentation of courses in the public sector. The high esteem of SAIGA courses has been developed over a number of years by involving only experts in the development and presentation of the CPE opportunities. The presenters have been involved with numerous training initiatives in the public sector and the *Public Finance Management Act* in particular. They serve on various professional committees and have years of experience in the field of continued professional education and are supported by senior staff.

## Accommodation:

Participants are responsible for arranging their own accommodation. The Secretariat can provide details of accommodation in relative close proximity to the training venues.

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5 day course



## Registration & Booking form

This form can be used to book your place on any of the course dates



012 362-1221

SAIGA  
PO Box 36303  
MENLO PARK 0102



012 362-1418

Please book the following persons for the course as indicated below  
(if space insufficient, use a separate page providing the same details)

SURNAME	INITIALS	TITLE	POSITION HELD	DATE FOR WHICH BOOKING IS REQUIRED

Due to the limitation of the number of participants per group, places cannot be guaranteed. The institute will finalise bookings and inform participants of successful booking or communicate alternative dates. VAT invoices will be issued as soon as bookings are finalised and accepted. **Full payment must be received in advance of the course.**

Organisation/Department

Postal address

Code:

Telephone number  
(and area code)

Fax number

VAT Registration number

As required by Government Gazette No. 25864  
For full details visit the VAT section at [sars.gov.za](http://sars.gov.za)

E-Mail address

Authorised signature \_\_\_\_\_ Name of signatory \_\_\_\_\_

SAIGA corporate membership number (if discount is claimed)

On-line registration can also be done through our website at: [www.saiga.co.za](http://www.saiga.co.za)